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Fieldwork Educators' Perceptions of Level II Students' Emotional Intelligence

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Under the direction of the research advisor:

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Abstract

This study was conducted to better understand fieldwork educators' perceptions of Level II students' emotional intelligence (EI) and its impact on fieldwork performance. The findings contribute to the greater body of knowledge by providing awareness of EI so that fieldwork educators and students may be more informed about its value in fieldwork. Five fieldwork educators from various practice settings participated in a two-hour focus group (Hollis, Openshaw, & Goble, 2002). Based on common theories, EI can be defined as a "set of emotional and social skills that influence the way we perceive and express ourselves, develop and maintain social relationships, cope with challenges, and use emotional information in an effective way" (Stein & Book, 2011, p. 13). Emotional intelligence is divided into five main categories to serve as a foundation for the discussion. These categories included: self-regulation, motivation, empathy, self-awareness, and social skills (Gutman, McCreedy, & Heisler, 1998). The participants' responses were analyzed, resulting in three categories: aspects of EI, the impact that EI has on student development in various practice settings, and growth of students' EI that stems from feedback from fieldwork educators and application to Level II fieldwork. The fieldwork educators suggested that communication, personal experiences, and opportunities to independently practice were the variables they found to have the most influence on students' EI growth. Continuing research and education on EI are essential for the profession of occupational therapy and the fieldwork experiences of students as they work to become entry-level practitioners.

Fieldwork Educators' Perceptions of Level II Students' Emotional Intelligence

Level II fieldwork is an integral part of an educational curriculum that prepares students for entry-level work as an occupational therapist according to American Occupational Therapy Association (AOTA) (2018). Emotional intelligence (EI) is a personality aspect that can lend to success in fieldwork, but it is not thoroughly defined or understood. Fieldwork educators, coordinators, and occupational therapy students have acknowledged there is limited research related to EI, and students' EI levels may not be adequate for their fieldwork experience (Hanson, 2011).

In established research, EI has been documented as an important aspect of professionalism (Andonian, 2017). Emotional intelligence has been researched in healthcare fields such as nursing and physical therapy (Faye et al., 2011), but researchers in the field of occupational therapy have focused on professionalism rather than EI (Andonian, 2017; Grenier, 2015). Because research has shown professionalism to be a category within EI, the current researchers believe it is important to study the impacts that EI can have beyond professionalism. Based on common theories, EI can be defined as a “set of emotional and social skills that influence the way we perceive and express ourselves, develop and maintain social relationships, cope with challenges, and use emotional information in an effective way” (Stein & Book, 2011, p. 13). This study focused on five aspects of EI as delineated by Gutman, McCreedy, and Heisler (1998): self-awareness, motivation, empathy, social skills, and self-regulation.

Researchers indicate students are scoring lower on fieldwork evaluations and have not been as successful in fieldwork experiences in recent decades (Gutman et al., 1998; James & Mussleman, 2006), which may be partially due to a lack of EI in students. This study furthers the knowledge and importance of EI for occupational therapy students and fieldwork educators by

clarifying how EI is used within occupational therapy fieldwork education. The purpose of this study is to determine what categories of EI are most important to occupational therapy Level II fieldwork educators in order to better prepare occupational therapy students for Level II fieldwork.

Literature Review

Since the 1980s, researchers have evaluated EI as a predictor of academic and healthcare success (Brown, 2016; Cantor & Kihlstrom, 1987; Gardner, 1983; Gutman, 1998). Wondering about the influence of EI led researchers to develop EI theories that have common categories, including emotional management, communication, attitude, reasoning, awareness, and motivation (Carmeli & Josman, 2006; Goleman, 1996; Lopes, Grewal, Kadis, Gall, & Salovey, 2006; Mayer & Cobb, 2000; Mayer, Salovey, & Caruso, 2008). For occupational therapy students to perform well within fieldwork, they must understand their emotions and the emotions of others, and then apply this knowledge professionally (Brown, 2016). “Professional behaviors are essential to occupational therapy students’ success in academics and fieldwork and must be taught throughout their time in a graduate program in order for them to be well-rounded entry-level practitioners at the completion of their studies” (Hackenberg & Toth-Cohen, 2018, p. 9). These themes of emotional management, communication, attitude, reasoning, awareness, and motivation, in addition to professionalism, are components of EI that can contribute to success in fieldwork education and should be studied further.

Occupational therapy education is based on coursework and two levels of fieldwork. The 2011 Accreditation Council for Occupational Therapy Education (ACOTE) Standards describe fieldwork as “a crucial part of professional preparation” (AOTA, 2012, p. 33). The goal of Level II fieldwork is to develop competent students who can clinically reason well as they advance into

entry-level practice (AOTA, 2014). Fieldwork sites, educators, and students are bound to the ACOTE standards that determine the guidelines and duration of settings for students, which could influence each student's professional and personal experiences. The ACOTE standards C 1.11 to C 1.19 influence how academic fieldwork coordinators structure students' fieldwork placements, including how fieldwork educators are chosen, length of fieldwork, skills needed for students to participate in fieldwork, and the evaluation of students (AOTA, 2011). Each ACOTE standard is designed to enable occupational therapy students to achieve entry-level competency in all required areas of practice.

The ability to use EI to understand, measure, and develop the skills necessary to build therapeutic relationships is crucial to the improvement of the occupational therapy profession, and fieldwork educators appreciate students from occupational therapy education programs who are well prepared for fieldwork (Andonian, 2017; Evenson, Roberts, Kaldenber, Barnes, & Ozelie, 2015; Taylor, 2008). Fieldwork educators try to shape students in a positive way as the students continue to develop their personal goals and preferences as future occupational therapists (Clarke et al., 2015). Fieldwork educators' understanding of EI and their expectations of students influences the way they teach and guide the students they supervise during fieldwork.

Healthcare professionals, including fieldwork educators, use their EI daily as they interact with clients, caregivers, and other healthcare providers. Occupational therapists and other professionals use EI whenever communication and emotions intersect (Andonian, 2017). In the field of occupational therapy, it is necessary for practitioners to have effective EI to work with other medical professionals, build rapport with clients and their families, determine therapy goals for the client, and facilitate therapy sessions (Brown, 2016). Occupational therapy students with low EI may struggle to pass fieldwork requirements (Gribble, 2018). According to Gribble

(2018), occupational therapy students show room for improvement in the areas of regulating stress and working through issues that arise on fieldwork. Occupational therapy students' EI can improve through exposure to diverse environments and life experiences in all contexts (Faye, 2011). Improvement in EI can lead to increased stress regulation and problem solving for Level II fieldwork students. Level II fieldwork educators have the potential to cultivate an environment in which a student's EI level can improve, but the fieldwork educator and student need to have the same understanding and expectation for EI and how it develops.

Students can increase EI beyond fieldwork experiences by working towards enhancing empathetic behaviors, dealing with complex emotional situations independently, collaborating well within team interactions, and making better clinical decisions (Gribble, Ladyschewsky, & Parsons, 2019). Gribble et al. (2019) found that integrated learning through university curriculum, the clinical supervisor's continuous feedback, and supervisor training on EI can increase EI competencies of occupational therapy students. Therefore, by providing students with competent clinical supervisors and adequate content from their curriculum relating to EI, students can achieve higher levels of EI more readily in their Level II fieldwork settings.

Currently there are limited valid and reliable tools to test and measure EI levels in occupational therapy students. In order to understand what level of EI is needed to succeed in occupational therapy and in Level II fieldwork, more information is needed on the categories of EI that fieldwork educators currently place at a high value. Research that focuses on effective leadership and EI, in people other than students, is lacking (Andonian, 2013; Kerr, Garvin, Heaton, & Boyle, 2006). The student perspective of fieldwork experiences has been acknowledged in the literature to help inform and improve fieldwork education; however, the fieldwork educator perspective has yet to be studied (Grenier, 2015).

Because the researchers have not found a specific understanding of EI for therapists or students defined in the literature, the aim of this study is to determine the value of EI for practicing therapists who are fieldwork educators in order for educators to better prepare students for their fieldwork experience. In this study, fieldwork educators provide further insight into the characteristics of EI that are more apt to lead to success in student performance on fieldwork. The hope is that students will be more informed about how to prepare as they begin their respective fieldwork rotations. If occupational therapy students can learn about their level of EI, including how to effectively control their emotions and the ability to perceive others' emotions, then we hypothesize this awareness will increase success in Level II fieldwork.

Methodology

Design

Researchers conducting this study used qualitative methods through a single focus group session to collect narrative data about fieldwork educators' perspectives on EI in occupational therapy practice and Level II fieldwork students (Taylor, 2017). The research group had limited time, preventing additional focus groups from occurring (Hollis et al., 2002). The study design was implemented using a phenomenology approach (Wilding & Whiteford, 2005) through inductive reasoning in order to better understand the data gathered and the use of EI in occupational therapy fieldwork.

Participants

The focus group participants were five registered occupational therapists, currently working as Level II fieldwork educators in the state of Indiana. Hollis et al. (2002) reported that five focus group participants are acceptable when additional depth on the topic is necessary. Purposive criterion sampling was used to recruit participants from the University of Indianapolis

School of Occupational Therapy fieldwork educator database. The inclusion criteria included practicing as a registered occupational therapist for at least two years, having hosted Level II fieldwork students for at least one year, working and living within two hours of Indianapolis, and regularly hosting students from both University of Indianapolis and other institutions. These criteria were chosen to ensure participants had experience working with students from a variety of programs, implying diverse knowledge of EI in a fieldwork setting. Participation was voluntary within this study, and it was communicated in the informed consent document that participants could remove themselves from the study at any point in time (see Appendix A for the informed consent document).

Materials

The focus group facilitators used an informational powerpoint presentation with a handout to educate the participants about the topic of EI and supply them with a reference point during the discussion (see Appendix B for informational materials). The researchers recorded the session with one audio-only device from the University of Indianapolis and two personal, password-protected devices to ensure accuracy of statements and for transcription purposes. At the conclusion of the focus group, anonymous response satisfaction surveys were distributed to participants via email to record the accuracy of the transcription and quality of the conclusions made by the researchers as a trustworthiness strategy to enhance credibility (see Appendix C for survey sent to participants).

Procedure

Informational emails and phone calls describing the study and asking for participants were communicated to multiple fieldwork coordinators and educators in diverse practice settings (see Appendix D for initial invitation). The fieldwork educators were informed about the purpose

of the study, procedures of the study, time commitment, potential benefits, and potential risks. Each fieldwork coordinator was asked to send this email to fieldwork educators in their setting that met the inclusion criteria for the study. Participants were provided a date to RSVP for the study. Five fieldwork educators responded and consented to participate. Due to the limited responses we received, our primary investigator/research advisor made additional phone calls to more fieldwork educators. Participants were also asked to forward this information along to other fieldwork educators who met the inclusion criteria and might be interested in participating in the study. Occupational therapy settings represented by the participants included inpatient acute care, inpatient psychiatric care, adult day center community care, and outpatient hand therapy.

A focus group discussion took place in a classroom in the Health Pavilion on the University of Indianapolis campus. Upon entering the room, participants were asked to sign the informed consent document. The informed consent document included consent to voluntarily participate, to be recorded during the focus group, and to be contacted for follow-up surveys via email. All participants fully consented at the time of the focus group. This consent form also included information detailing what their consent entailed, assurance of confidentiality, and space for signatures. Participants were assured that any documentation would be de-identified prior to publication. The documents and recording device were kept in a locked box in the research coordinators office so researchers could send participants a follow-up survey for the purpose of group member-checking and to ensure credibility of results. Light refreshments (cookie tray, water) were provided to participants during the time of the focus group.

Four student researchers and the research advisor led the session which lasted for two hours and included discussion of nine questions relating to fieldwork educators' evaluation and experiences of EI in Level II fieldwork students. The student researchers presented a brief

educational overview on EI to set a baseline level of knowledge for the participants. Prior to asking the following questions, the researchers reminded participants to not specify past students' names or the names of the programs that the students they were referring to were enrolled in at the time of fieldwork. The participants were again informed that the session would be recorded for transcription and analysis purposes. Prior to the focus group, two faculty fieldwork educators from the University of Indianapolis peer-reviewed the focus group questions. All peer-reviewers unanimously approved the questions, and no suggestions for edits were indicated. The questions asked included:

1. What is your understanding of EI?
2. What positive experiences have you encountered with EI in practice and with students (not just UIndy students)?
3. What negative experiences have you encountered with EI in practice and with students (not just UIndy Students)?
4. What aspect of EI is most obviously missing in fieldwork students?
5. What characteristics of EI are most important for occupational therapy?
6. How do you use these important characteristics in everyday practice?
7. What expectations do you have for students beginning fieldwork?
8. Can you describe your ideal Level II fieldwork student?
9. What can you do as a fieldwork educator to improve a student's EI throughout the fieldwork experience?

Student researchers observing the group took digital notes of points of interest made from participants to be reviewed after the coding process was complete. Following the focus group, two student researchers used the audio recording to transcribe the data. Participants were

sent two follow-up surveys through an email link to Qualtrics XM after the focus group to confirm validity of categories and accuracy of transcription.

Data Analysis

Two researchers transcribed the focus group data from the voice recording onto separate electronic documents, omitting any identifiable information. The other research group members confirmed the transcription to ensure credibility through member checking as the researchers reviewed the document as a group while concurrently listening to the audio file. Researchers were able to apply triangulation of data sources and investigators since focus group members worked in various occupational therapy settings and there was a research team rather than a single researcher.

The researchers sent the transcription via email correspondence and Qualtrics XM survey to the participants prior to researchers beginning the coding process for member checking. No participants responded to the first survey to confirm the results. Four researchers individually created codes through inductive reasoning and in vivo coding based on the data collected. Two researchers created nine codes each based on the data, and the other two researchers created 12 codes each. A total of 42 codes were consolidated and organized to make three categories from the data following in vivo, pattern, and inductive coding (Johnson & Christensen, 2014). The final categories and subcategories were member checked by the participants via email correspondence through a second Qualtrics survey. Two participants responded and confirmed the results.

Findings

After reviewing and analyzing the information from the focus group transcript, three main categories emerged: aspects of EI, differences in the development of EI, and growth in occupational therapy students' EI.

Aspects of Emotional Intelligence

Aspects of EI discussed in the focus group included six subcategories: self-awareness, self-regulation, motivation, social skills, empathy, and professionalism.

Self-Awareness. Self-awareness is the ability to understand and reflect on one's emotions and take appropriate actions (Goleman, 1996). Participants identified self-awareness as one of the most obvious and most frequently lacking areas of EI in occupational therapy students. One participant stated, “. . . when there are issues [self-awareness] is kind of the one that stands out to me.” Self-awareness was also discussed in the context of interacting with others and that self-awareness was required to respond in an appropriate demeanor. A participant stated, “The expectations I have for myself...not putting those on other people, because I have very high expectations for myself. And I know this, and I do practice this, but sometimes I slip.” One participant described relying on self-awareness and facial expression, stating, “part of my own emotional awareness is that... I have to know that I have this look. That is, I think [the look is] discerning, but other people might see it as otherwise.” Participants also reflected that they continue to work on this component of EI as practitioners along with other areas of EI: “I think for me I can work on both of those things [self-awareness and self-regulation].”

Self-Regulation. Self-regulation is how one handles tough situations by remaining calm and motivating oneself to move on and achieve excellence (Goleman, 1996). When discussing self-regulation during the focus groups, participants emphasized the concepts of coping under various circumstances, managing one's own emotions, and perceptions of how students express

their emotions and behaviors. Various circumstances requiring high levels of self-regulation were discussed, specifically the time of day that clinicians are providing care to clients. For example, one participant who practices in a community setting discussed how it can be difficult to maintain self-regulation, stating,

[I will be] maintaining that regulation depending on the time of day it happens. I have one individual that I work with that was calling me at 5:30 AM to tell me that he was out of frozen vegetables. ... That was a time when not maintaining [my] emotions was [evident]. ... Sometimes that emotion comes through because you're human.

One participant described how she uses self-regulation coping techniques in practice to manage her own emotions when she begins to feel frustrated. She used these strategies to prevent clients or students from perceiving that negative emotion. She stated, "I need to make sure I take a deep breath and give them time to process and make sure I'm not coming across [poorly] with my own expectations." Another participant elaborated on this point and stated how she has to manage her self-regulation when supervising students so that the student can have more freedom and independence, even when the educator is aware that as a clinician he or she could complete the task more efficiently. This participant stated, "It's kind of like going out on a limb, like 'you know you might be wrong, but it's okay. You might not get an A on this one, but it's okay.'"

One participant stated that developing rapport with clients that have poor self-regulation is a skill that can be difficult for students. Lastly, a participant stated that she has perceived occupational therapy students' self-regulation levels increasing with the transition from a masters degree requirement to a doctoral degree, elaborating,

I noticed a difference in ... EI from when [occupational therapy program requirements] moved from an entry-level bachelor's into an entry-level master's level program. I

thought the quality of the students that were coming in, [the doctoral students] seemed to be more highly motivated and had better self-regulation.

Motivation. Motivation is a quality that promotes focused actions towards achieving goals (Goleman, 1996). “Confidence in one’s abilities generally enhances motivation” (Benabou & Tirole, 2002). Fieldwork educators discussed motivation in the areas of confidence, personal factors outside of the classroom, and knowledge of assignments. Participants agreed that over time students become more confident in their clinical skills and maintain self-regulation during fieldwork. One participant stated,

They come in with a different level of confidence because they’ve done some [fieldwork]. . . . They just have that more confidence, [saying] “I’ve done some things, I’ve been successful in this area, and I know I can handle this when I’m going forward.”

Fieldwork students have to reconcile their personal and professional motivation within each setting in order to be successful on the rotation. One participant stated that she has experienced some students struggling with motivation during fieldwork, but typically all students have a high level of motivation. A participant stated,

The motivation is huge, just that self-driving force, because we’re going to help you as much as we can. We’re your CI [clinical instructor]. We’re going to help guide you, help maximize your learning experience, but we can’t want it more than you.

Participants also agreed that motivation is often impacted by differences in personality and the external factors a student experiences during their fieldwork. One participant stated,

“Personalities are all so different and their backgrounds. . . . I think knowing that student can help you kind of guide them, and being aware of their background and their cultural diversity is important when working with the [students].” Lastly, the participants identified that a student’s

motivation to take responsibility for school assignments throughout the fieldwork rotation reflects their EI. One participant stated, “You’re responsible. You’re in charge of this stuff. You let your fieldwork educator know. It’s not [the fieldwork educators’] responsibility.”

Social Skills. Social skills are the ability to understand what other people think (Goleman, 1996). Participants discussed social skills in different therapeutic relationships: (a) occupational therapy fieldwork students’ social skills with clients, and (b) fieldwork educators’ social skills with clients and with occupational therapy students. One participant stated that in the psychiatric setting, students often have difficulty socially interacting with the clients because proper interaction requires a balance of “not being condescending with patients but not also talking over their heads.” Another participant stated that social skills are the biggest component for occupational therapy students to develop in order to build rapport, increase participation, and determine important occupations for each client, describing,

As an [occupational therapist] coming in being client-centered, [we are] looking at this holistic situation. Especially with trauma, we have a very short timeframe to get a lot done, to get the patient engaged. ... I would say that’s probably the biggest component to me would be social skills.

Also, a participant noted that sensing and responding to family member’s emotions helps build rapport in order to have effective sessions. Lastly, one participant discussed how practitioners in the field of occupational therapy need to be empathetic with all clients and caregivers, referencing how to be empathetic “with the families in the room with a patient that is intubated, and recognizing other people’s emotions ahead of your own can also get you further in sessions.”

Empathy. Empathy is the ability to understand other people’s feelings (Goleman, 1996). Empathy was discussed during the focus group as an essential component to occupational

therapy. One participant described empathy as the ability to “understand where that individual [client] is coming from” in order to appropriately respond. Another participant described how empathy is required when fieldwork educators are working with students, the stressors of learning how to implement various clinical skills, and the various life events that impact students' performance. Additionally, one participant stated that empathy is crucial for successful client interactions because many of the clients occupational therapists treat are recovering from a traumatic event and “their life has totally changed.”

Professionalism. The definition of professionalism varies based on the discipline, setting, and context but can be conceptualized as the necessary skills and behaviors that help make an individual respectful and successful in their profession (Campbell et al., 2015). When discussing professionalism, the participants elaborated on an additional subcategory of flexibility. One participant stated that professionalism and flexibility are important for a successful Level II fieldwork experience that allows productive learning and growth. The participant elaborated on this and stated, “For [Level II fieldwork rotations] I think I would say professionalism is a big one and then flexibility is really big. Especially in inpatient [settings]. Things are always changing, and so being flexible is key.” Another participant discussed flexibility in clinical situations and feeling the need to encourage students by asking,

What are you going to do? What's your plan? And you've always got to have that backup plan. Like you say [the plan is] a,b, and c, and how's my day going to go if it changes . . . I think sometimes [the students] get so focused on the plan they bring out that they then, if something happens, it is like “Oh, I don't know where to go with that.”

One participant defined professionalism as being on time, taking initiative to look up information, completing chart reviews, and consistently providing the highest quality of care.

Another participant agreed that “taking that initiative” and being “self-driven” are important characteristics of professionalism. Conversely, another participant stated they have had few experiences with students that do not have appropriate levels of “professionalism or respect.”

Differences in Development of Emotional Intelligence

Differences in the development of EI were found to be based on variations in practice setting, fieldwork educators, students, and response to potential challenges. The participants reported that it is often clear which category or categories of EI may be lacking in students. As stated by one participant,

[The missing category of EI] varies by student, because each student is different. I don't necessarily see any consistent EI categories across all students. I've seen some that have had difficulties with motivation, I've had some difficulties with emotions, some difficulty with self-regulation, some with self-direction.

Another participant elaborated that for all but one fieldwork student they had taught, motivation is not a component of EI that is lacking. The subcategory of differences in students was further delineated into how their personality, personal background, past experiences in fieldwork, and fieldwork duration impact EI. One focus group participant stated, “everyone interacts differently,” which reveals the individual differences of each student and fieldwork educator. Another participant reflected on her experience as a fieldwork educator, stating, “[when] supervising others, you're aware of different personalities and different interests.” Being aware of these differences can aid the fieldwork educators in managing the Level II fieldwork students.

Growth in Emotional Intelligence

Participants stated their feedback and criticism, the opportunity for a student to independently respond, and fieldwork educators' expectation that students' EI would grow throughout the fieldwork experience impacted students' growth in EI. One participant said, "... being able to take feedback and being willing to learn and grow is really important, because that's why they're there, and we're there to help them do those things." Ideally, students should be "... able to take feedback, and then not just take the feedback, but be able to utilize that feedback where you see the change." Participants mused that feedback and criticism contribute to students' growth based on the students' self-awareness and an adaptive response to the feedback.

The participants agreed that students' largest growth occurs in the 8- to 12-week window of their Level II fieldwork experience, by which point students are encouraged to respond to client needs and grow in confidence as a practitioner as they learn through trial and error. "I love the 12-week students. The 8-week programs, it's been very frustrating for me to have those 8-week students, because I just don't feel like they have enough time to get fully ingrained and fully set." One participant stated, "[students] are going to try something that you're like, 'I don't know if that's going to work,' but then it does." Participants concluded that students' growth in EI categories through this time helps with clinical decision-making. A participant stated, "I think giving them the opportunity to try and fail or succeed on their own is preparing [students]."

Discussion

The purpose of this study was to determine what categories of EI are most important to occupational therapy Level II fieldwork educators in order for students to be better prepared for Level II fieldwork. Participants discussed their understanding of EI and how students' performance on Level II fieldwork improved the development of EI. When reviewing the

literature, it was found that EI is multifaceted and can be separated accordingly into different categories (Calabrese, Lape, & Delbert, 2019; Gutman et al., 1998). For the purpose of this study, the researchers decided to reference five comprehensive categories of EI set by Gutman et al. (1998) to serve as a framework for the discussion during the focus group. The participants' responses provided during the focus group determined this study's six finalized categories with the addition of professionalism. Following data analysis, the researchers found that the categories were congruent with themes found in literature (Gutman et al., 1998). Additional categories discussed in the study contribute to the current body of knowledge surrounding the EI of occupational therapy students. The participants agreed that the provided categories represented EI seen in students and were necessary for practice. They felt that all categories related to each other, and none were more significant than the other to achieving high levels of EI.

The participants determined that EI is a characteristic unique to everyone that reflects previous professional and personal experiences. Though generally recognized by clinicians in practice, the current researchers found limited evidence of EI being explicitly documented or reviewed in previous research specific to Level II fieldwork and occupational therapy students. The participants emphasized the impact on students' EI during fieldwork experiences.

The process of growth in students' EI was a pivotal point of discussion and a critical finding in the data gathered. The fieldwork educators expressed that students' EI is typically at appropriate levels when starting fieldwork if students can professionally communicate, receive constructive feedback, and implement suggested changes. The fieldwork educators conveyed that students' EI typically shows most improvement throughout the last four weeks of the 12-week experience, although Level II fieldwork experiences can be formative through the duration. The reason for this growth was speculated to be due to students independently responding to clients

and managing the occupational therapy plan of care after week eight. When students have the opportunity to implement their own intervention ideas, regardless of degree of success, the student learns how to communicate with clients and redirect the session so that it is still successful in a new way.

Along with increased independence, the participants reported that self-reflection and frequent discussion between fieldwork educators and students are beneficial strategies to improve students' EI. Other researchers have found that various modes of self-reflection, including journaling, throughout fieldwork experiences were helpful for determining beneficial coping strategies and immediate action steps to improve interactions with clients and coworkers (Iliff et al., 2019; Perkins & Schmid, 2019). When properly supported by their fieldwork educator to take the time to self-reflect on challenges, stressors, and positive responses, fieldwork experiences are a pivotal time for students' confidence and EI to improve. Fieldwork educators highly influence students' EI growth through providing feedback and clear communication. If fieldwork educators are not positively cultivating students' EI, there is potential for students' EI to decrease throughout their fieldwork experience (Gribble, Ladyschewsky, & Parsons, 2019). Participants did not give specific examples to support this in the focus group, indicating the need for further discussion in the future.

Based on the analysis from the focus group, fieldwork educators perceive that the six components of EI improve through clinical experiences when fieldwork educators understand EI, provide frequent and constructive feedback to the student, and allow students nearly full independence with clients' plan of care by the end of the fieldwork experience. Other researchers have determined alternative strategies that improve EI. Calabrese, Lape, and Delbert (2019) found that online training modules facilitate improvement for all categories of a student's EI.

Gribble, Ladyschewsky, and Parsons (2019) found in a longitudinal study that experiential clinical environments alone do not consistently improve graduate students' EI levels. For students' EI levels to improve, additional education, programs, and habits need to be in place in order to effectively improve all categories of students' EI (Gribble et al., 2019).

One contradictory finding between information retrieved from current literature and the perspective of the fieldwork educators is the overall changes in EI. Researchers have found that EI levels are decreasing without explainable reasons (Gutman et al., 1998; James & Mussleman, 2006), but the participants have perceived students' EI gradually improving with the transition from a bachelors degree to a doctoral degree requirement in the field of occupational therapy. The researchers believe that this discrepancy between established research and our participants' opinions may be a result of regional differences and whether doctoral, masters, or bachelors level degrees were offered to students participating in the established research. The length of time of the fieldwork placement may also impact students' level of EI throughout their rotation. Each university determines length of Level II fieldwork as long as a total of 24 weeks of fieldwork are completed; however, the participants in this study felt that dividing Level II fieldwork into two 12-week rotations was the most beneficial to students.

Implications for Occupational Therapy Practice

Emotional intelligence traits allow students to improve their interpersonal and intrapersonal skills, coping strategies, and emotional management during their fieldwork placements. Fieldwork educators described self-awareness, self-regulation, and motivation as commonly recognized and utilized during Level II fieldwork. Students use self-awareness to improve intuition and clinical reasoning skills that guide decision making during treatment sessions, including performing assessments, developing interventions, and setting appropriate

goals for clients. By incorporating self-regulation in practice, Level II students can cope with uncommon or uncomfortable situations and manage their emotions accordingly. Increased knowledge of EI can help students “enhance empathic behaviors, deal with complex emotional scenarios independently, perform well in team interactions, and ultimately make better clinical decisions” (Gribble et al., 2019, p. 8).

Limitations

This study had several limitations. Although the sample was specifically chosen based on convenience and practice setting, the small number of participants in the focus group does not represent all fieldwork educators' experiences or insight on the topic, reducing the transferability of this study's findings. The participants' practice settings varied but did not represent all occupational therapy settings, further reducing transferability. The students conducting the focus group were novice researchers, and no trial focus group sessions were conducted. The variation in fieldwork educators' responses throughout the focus group discussion and only completing one focus group prevented saturation, therefore eliminating the possibility of eliciting as much information as possible from the participants, reducing confirmability and credibility.

Future Research

Future research is needed to address remaining gaps of knowledge related to EI within the field of occupational therapy. Current research on occupational therapy students' EI highlights quantitative data using general outcome measures to track changes and evaluate students' EI. Due to the subjective nature of EI, additional research needs to be conducted to review students' and fieldwork educators' perspectives. Additionally, EI has not been longitudinally studied in occupational therapy practitioners nor how EI changes over time or improves with clinical experience. Development of a valid and reliable outcome measure for EI

in the field of occupational therapy or occupational therapy education would specifically benefit occupational therapy practice by encouraging therapists to engage in self-reflection and further develop therapeutic use of self. An occupational therapy-specific assessment for monitoring changes in EI throughout occupational therapy programs would also improve consistency of research and practicality for implementation in occupational therapy education. The ACOTE standards referenced in this study have been replaced by new standards, which will need to be referenced by occupational therapy students and fieldwork educators. Future research will need to evaluate the updated 2018 ACOTE standards C 1.10- 1.16 (AOTA, 2018) and their relationship to the importance of growing students' EI. Other studies may focus on determining the specific variables in students' experiences that impact EI positively or negatively. EI is a broad and evolving area of study, and understanding components that influence the development of EI would make occupational therapy professionals and students better equipped to treat clients, work as productive colleagues with other healthcare professionals, and manage their emotions in a professional manner.

Conclusion

Fieldwork educators who participated in this study confirmed that EI can be defined as six main components that are interactional through various circumstances experienced in occupational therapy practice and education. The participants expressed that students' EI growth was most evident in the last four weeks of a 12-week Level II fieldwork rotation due to students' increased independence with client care and implementing interventions with minimal suggestions from a fieldwork educator. Overall, communication, personal experiences, and opportunities to independently practice were the variables that emerged as categories that the fieldwork educators felt impacted students' growth in EI. Self-awareness, self-regulation, and

motivation emerged as the most apparent EI aspects already present in students the participants had supervised. The participating fieldwork educators perceived that students' EI is typically at appropriate levels when entering fieldwork experiences, but with appropriate communication, reflection strategies, and opportunities conducive to learning, the fieldwork educators noticed potential improvement in students' EI during Level II experiences.

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Appendix A

Informed Consent

The University of Indianapolis School of Occupational Therapy

KEY INFORMATION FOR POTENTIAL RESEARCH PARTICIPANTS

Level II Fieldwork helps prepare students for work after graduation by completing 24 weeks of practical experience. Emotional Intelligence (EI) has become an increasingly important aspect to ensure success in fieldwork, yet it is still not thoroughly defined or understood. Fieldwork educators, coordinators, and occupational therapy students have acknowledged that there is limited understanding of EI, and students' EI levels may not be adequate for their fieldwork experience.

This study will further the knowledge and importance of EI for occupational therapy students, fieldwork educators, and working professionals, and clarify the role of EI within occupational therapy. The purpose of this study is to determine what aspects of EI are most important to occupational therapy Level II Fieldwork educators in order to better prepare occupational therapy students for Level II Fieldwork.

Inclusion criteria includes being an OTR for at least two years, being a Level II FWE for at least one year, working and living within two hours of Indianapolis, regularly hosting University of Indianapolis OT students, as well as students enrolled in occupational therapy programs. A focus group will be used to gain insight into fieldwork educators' experiences. Data will be analyzed using intuitive reasoning and in vivo coding and interpreted into an electronic document. A follow-up survey will then be sent to verify correct documentation of discussion, and a second follow-up survey will be sent to verify categories coded by the researchers.

The researchers are seeking your consent. Participation in research is voluntary. The focus group will last for two hours on the University of Indianapolis campus, and follow-up surveys will be sent within three weeks of the focus group meeting. There are no anticipated risks or discomforts. Any personal data disclosed during the focus group will be de-identified or removed from the transcript. Participation will benefit fieldwork educators by providing insight into students' emotional intelligence levels and contribute to the greater body of knowledge by providing students with information about fieldwork educators' experiences regarding emotional intelligence.

CONSENT TO PARTICIPATE IN RESEARCH STUDY

Level II fieldwork educators' perception of occupational therapy students' emotional intelligence.

Study Principal Investigator (PI): Dr. Rebecca A. Barton, OTR, FAOTA

UIndy Email: rbarton@uindy.edu

UIndy Telephone: 317-788-3511

Dr. Rebecca A. Barton, OTR, FAOTA

School of Occupational Therapy at the University of Indianapolis (UIndy) are conducting a research study.

You were selected as a possible participant in this study because you meet the inclusion criteria of being an OTR for at least two years, a level II fieldwork educator for at least one year, working and living within 2 hours of Indianapolis, Indiana, and have hosted UINDY fieldwork students along with other students from various Occupational Therapy programs. Your participation in this research study is voluntary.

Why is this study being done?

The purpose of this study is to better understand fieldwork educators' perceptions of Level II students' emotional intelligence and the impact on fieldwork performance. At the completion of this study, the findings will contribute to the greater body of knowledge by providing awareness of emotional intelligence so that fieldwork educators and students may be more informed about its value in fieldwork.

What will happen if I take part in this research study?

If you volunteer to participate in this study, the researcher will ask you to do the following:

- Participants will engage in a focus group with other people who fit the inclusion criteria. This will be a one time activity face to face. There will be 10 formal questions asked and conversation guided by the researchers.
 - All of the questions will relate to fieldwork and emotional intelligence.
- Participants will be sent two follow up surveys through an email link after the focus group.
 - The first one is to validate the findings from the focus group.
 - Example: "Is this what you recall saying?"
 - The second survey will be validating the categories after being coded.
 - Example: "Do these categories seem accurate based on your focus group experience?"
- The study will take place in a classroom in the Health Pavilion at the University of Indianapolis.

How long will I be in the research study?

Participation will take a total of about two hours at the University of Indianapolis for a focus group session, travel time to and from campus, and 20 minutes to review findings and complete a follow up survey. The follow up survey will be sent out within three weeks of the focus group.

Are there any potential risks or discomforts that I can expect from this study?

There are no anticipated risks or discomforts.

Are there any potential benefits if I participate?

You may benefit from the study a greater understanding of emotional intelligence concepts and their application in occupational therapy practice. Participants may also gain insight in how to better interact with students during fieldwork to facilitate their emotional intelligence improvements. Participants will be offered refreshments (cookies, water) at the focus group session.

The results of the research may allow for occupational therapy educational programs to incorporate into the curriculum the aspects of Emotional Intelligence that are most valued by Level II Fieldwork Educators. Therefore, students may be better prepared for fieldwork by being made aware of the fieldwork educators' expectations.

What other choices do I have if I do not wish to participate?

If you choose not to participate in this study, then you may leave the focus group at any time. If you do not wish to be emailed the follow-up survey from the focus group, then your email will be taken off the list and we will not send out the survey.

Will I be paid for participating?

No.

Will I receive course credit for participating?

No.

Will information about me and my participation be kept confidential?

The results of this study may be published in a scholarly book or journal, presented at professional conferences or used for teaching purposes. However, only aggregate data will be used. Personal identifiers will not be used in any publication, presentation or teaching materials.

The audio record tape and completed Informed Consent Forms will be kept in a locked drawer in the locked office of the primary research investigator. Only members of the research group will have access to the audio file for data analysis.

Will the data from my study be used in the future for other studies?

It is possible that de-identified data from this study could be used for future research or shared with other researchers for use in studies, without additional informed consent. De-identified means that any codes and personal information that could identify you will be removed before the data is shared.

Will my data be shared in any other way?

De-identified data will be presented in the finalized study to University of Indianapolis faculty and students.

What are my rights if I take part in this study?

- You can choose whether or not you want to be in this study, and you may withdraw your consent and discontinue participation at any time.
- Whatever decision you make, there will be no penalty to you, and no loss of benefits to which you were otherwise entitled.
- You may refuse to answer any question/s that you do not want to answer and still remain in the study.

Who can I contact if I have questions about this study?

- **The Research Team:**

If you have any questions, comments or concerns about the research, you can talk to the one of the researchers. Please contact:

Study Principal Investigator (PI): Dr. Rebecca A. Barton, OTR, FAOTA

Email: rbarton@uindy.edu

Telephone: 317-788-3511

- **The Director of the Human Research Protections Program (HRPP):**

If you have questions about your rights as a research participant, or you have concerns or suggestions and you want to talk to someone other than the researchers, you may contact the Director of the Human Research Protections Program, by either emailing hrpp@uindy.edu or calling 1 (317) 781-5774 or 1 (800) 232-8634 ext. 5774.

Follow up studies

We may contact you again to request your participation in a follow up study. As always, your participation will be voluntary and we will ask for your explicit consent to participate in any of the follow up studies.

How do I indicate my informed consent to participate in this study?

If you consent to participate in this study, then you affirm that you satisfy inclusion criteria and your consent is voluntary. To indicate your voluntary consent and proceed with the questionnaire, select one of the following options:

- ☐ I voluntarily consent to participate in this study.
- ☐ I do NOT consent to participate in this study.

Please indicate whether or not you consent to the following, but checking the appropriate box and initialing:

I agree to have this interview audiotaped : ☐ YES ☐ NO Initial _____

I agree to be contacted for a follow-up study: ☐ YES ☐ NO Initial _____

You will be given a copy of this information to keep for your records.

You do not need to sign this, or any other document to indicate your consent. Completion and return of the questionnaire indicate that you are willing to participate.

Appendix B

Informational Materials

Figure B1

Emotional Intelligence & Level II Fieldwork Students

A Focus Group for the University of Indianapolis School of Occupational Therapy

KEY ASPECTS OF EMOTIONAL INTELLIGENCE

GUTMAN, ET AL., 1998

- **Self-awareness:** knowing your own emotions
- **Motivation:** the internal drive or push for action
- **Empathy:** recognizing emotions in others
- **Social skills:** handling relationships with others
- **Self-regulation:** maintaining your own emotions

What is the definition of Emotional Intelligence?

Emotional intelligence is defined as a "set of **emotional and social skills** that influence the way we perceive and express ourselves, develop and maintain **social relationships**, cope with challenges and use emotional information in an **effective** way"

(Stein & Book, 2011, p. 13).

Figure B2

Why Emotional Intelligence is Important



- Productivity
- Workplace outcomes
- Relationship with others
- Clinical reasoning skills
- Self-awareness
- Professionalism

(Andonian, 2013; Hackenberg, G. R., & Toth-Cohen, S., 2018)



- Understand own emotions
- Understand others emotions
- Positive and encouraging environment
- Positive leadership qualities
- Increase career satisfaction

(Brown et al., 2016)

What is the purpose of the study?



Purpose
The purpose of this study is to determine what aspects of EI are most important to occupational therapy Level II Fieldwork educators in order to better prepare occupational therapy students for Level II Fieldwork.



Contribution
At the completion of this study, the findings will contribute to the greater body of knowledge by providing awareness of emotional intelligence so that fieldwork educators and students may be more informed about its value in fieldwork.



University of Indianapolis
School of Occupational Therapy

If you have any question,
please contact Rebecca
Barton at
rbarton@uindy.edu

Appendix C

Surveys Sent to Participants

Survey 1:

Is this what you recall saying?

Survey 2:

Does this align with what you understand about emotional intelligence?

Do you agree with our analysis with what this means for our profession?

Were you satisfied with this experience?

Do these categories seem accurate based on your focus group experience?

Appendix D

Initial Invitation to Participants

Dear FW Coordinator and/or Educator,

We are a group of doctoral students from the University of Indianapolis School of Occupational Therapy (OT). We have been researching information on how Fieldwork Educators (FWE) perceive emotional intelligence and what characteristics are sought after in occupational therapy fieldwork (FW) students. Please note that this information would be intended for research purposes to enable us to learn more about a topic we are passionate about and to prepare us to be better clinicians as a result of what we learn from your feedback.

We are seeking your expertise about Occupational Therapy Fieldwork expectations with regards to emotional intelligence (EI). Current research in these areas substantiate that these topics are integral to FW success.

We are hosting a focus group to facilitate discussion about these issues. This information will inform our FW programming and prepare for our students going into Level II FW at the University of Indianapolis School of Occupational Therapy.

We are hoping to have 8-12 Level II OT FWE from a variety of Occupational Therapy practice settings. The inclusion criteria for this focus group consisting of OT FW Educators are as follows:

1. Level II FW Educator for at least one year
2. OTR for at least two years
3. Level II FW Educator works/lives within two hours of Indianapolis
4. FW Educator's site has hosted UIndy OT Students, in addition to other programs, for Level II FW

Fieldwork coordinators, please forward this invitation to any fieldwork educators that you feel meet this criteria if you are not able to attend yourself.

There will be a meeting and follow up survey:

In Person Meeting:

The meeting will be held on October 21, 2019 in the UIndy Health Pavilion from 5:00pm to 7:00pm. We will send you some sample questions one week prior to the focus meeting so that you can be thinking about these questions. We will be providing a brief overview of Emotional Intelligence and the relationship to professional behaviors in students. We will audio record the session for the purpose of transcription and analyzing the results of the first focus group interview. We will not collect or use FW Educator names or places of employment.

Follow-Up Survey:

We will email you with the transcription of the first meeting in order to verify the accuracy of the transcription, and a second email will ask you to verify categories and results we gathered from

the focus group. This verification of our analysis will be completed through a survey anonymously online. Please provide honest feedback on the accuracy of our findings and any suggestions you have for improving the accuracy of the results.

We will share with you the results, upon the completion of this FW Program evaluation of Emotional Intelligence and Professionalism within a group OT FW Educators. Anticipated closure of this research project is December, 2020.

Please respond by September 30 with your RSVP. Thank you for your time and consideration. We look forward to hearing from you. Any questions about the focus group can be directed to Kathryn Haskell at haskellk@uindy.com or 618-316-8950.

Best Regards,
Rebecca Barton

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Rebecca A. Barton, DHS, OTR, FAOTA
Associate Professor
Director of Fieldwork
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Barton FINAL FWE Perceptions of Level II Students' EI (Barton OTD 2021)

Final Audit Report

2020-12-14

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