



# 2020 Annual Report

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## About

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The APTA Academy of Education, one of the oldest of the American Physical Therapy Association, is dedicated to the development of each new generation of physical therapy practitioners, a dynamic cadre of academic educators, and a store of knowledge useful to consumers for enhancing their own musculoskeletal health.

### *Mission*

Advancing PTs and PTAs as educators through professional development and research.

### *Vision*

All PTs and PTAs affirm and advance their role as an educator.

### *Brand*

Every PT and PTA is an educator.

# Strategic Goals 2019-2021

## RESOURCES

- **Educational Partners:** Develop collaborative educational opportunities with other entities<sup>2</sup> (i.e. APTA, ACAPT, AOTA, etc.)
- **Tech-Driven Resources:** Utilize technology (including web-based applications and social media) to engage members and deliver resources that promote effective teaching, learning, and scholarship.
- **Journal:** Position JOPTe as the journal of choice for best practice in PT/PTA education.
- **Professional Development:** Expand contemporary professional development opportunities (instructional tools, conferences and workshops).

## RESEARCH

- **Research Support:** Prepare educational researchers through initiatives such as GAMER, MERC, research grants, PODS, Adopt-a Doc and arising opportunities.
- **Publishing:** Raise the quality of published manuscripts in JOPTe to qualify for indexing in Medline.
- **Promote Opportunities:** Improve visibility of opportunities for educational research grants to increase the number of competitive applications.
- **Funding Sources:** Identify sustainable sources of research funding.
- **Recognizing Excellence:** Recognize excellence through the awards program

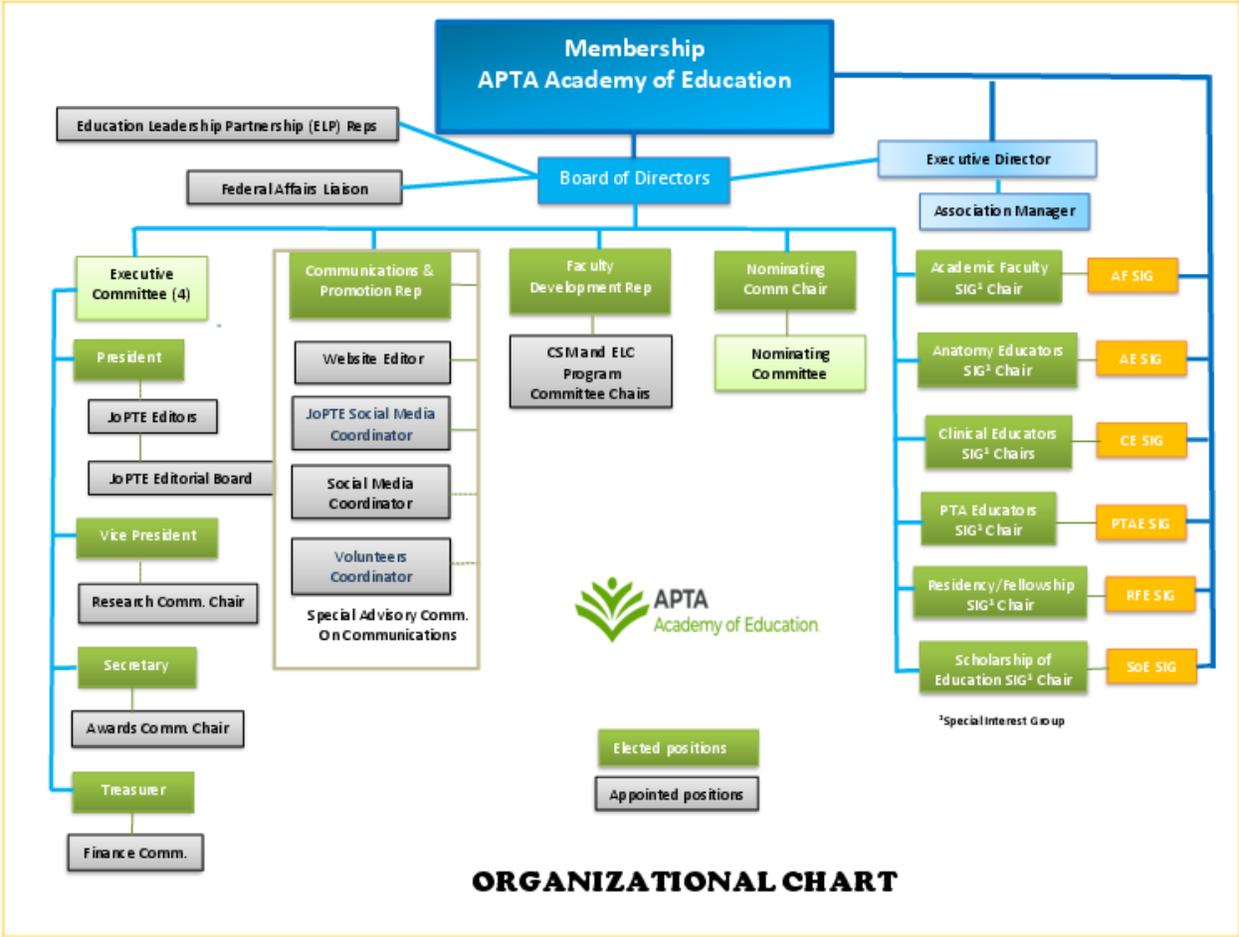
## ADVOCACY

- **Champion:** Champion the interests of the Academy and its members to APTA and other organizations.
- **Partnership:** Advance APTE's role within the Education Leadership Partnership, strengthening collaboration and communication to facilitate achievement of APTE's goals.
- **Clinicians as Educators:** Build a culture where clinicians identify themselves as patient/family educators.
- **Representation:** Identify and respond to key legislative and regulatory issues affecting physical therapist and physical therapist assistant education.

## STRENGTH

- **Membership:** Increase membership in the Academy and SIGs to reflect the diversity of the profession.
- **Community:** Promote inclusive relationships among members, partners, and stakeholders.
- **Technology & Communication:** Optimize communication among members utilizing contemporary technologies.
- **Value:** Promote the value of and return on investment for membership in APTE.
- **Governance:** Provide responsive, transparent governance and stewardship of resources.
- **Management:** Ensure effective and efficient organizational management.

# Organizational Chart



## Academy Leadership

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### **Thank you to our leaders whose terms of service concluded in 2020:**

Corrie Odom, PT, DPT, MS | Vice President  
Kai Kennedy, PT, DPT | Promotion & Communications Representative -at-Large  
Wendy J. Herbert, PT, DPT | Academic Faculty Vice Chair  
Katherine Masa Martinez, PT, PhD | Academic Faculty Secretary  
Rebecca Ann Bliss, PT, DPT | Academic Faculty Nominating Committee Member  
Donna Skelly, PT, PhD | Anatomy Educators SIG Chair  
David Ebaugh, PT, PhD | Anatomy Educators Nominating Committee  
Marsha Rutland, PT, ScD | Anatomy Educators Program Co-Chair  
Beth Moody-Jones, PT, DPT, MS | Anatomy Educators Program Co-Chair  
Alison McKenzie, PT, DPT, PhD | Anatomy Educators Affiliate Coordinator  
Lisa C Harrison, PT, DPT | Clinical Education Membership Secretary  
Barbara J. Behrens, PTA, MS | PTA Educators SIG Vice Chair  
Jackie Darwena Underwood, PTA | PTA Educators SIG Secretary  
Luke Markert, PTA, BS | PTA Educators SIG Nominating Committee Chair  
David B. Gillette, PT, DPT | Residency/Fellowship Education SIG Nominating Committee  
Chair  
Dana McCarty, PT, DPT | Nominating Committee Chair  
Lynn Fitzgerald, PT, DPT, Med | Awards Committee Chair  
Kathleen A. Rockefeller, PT, MPH, ScD | Research Committee Chair  
Skye Donovan, PT, PhD | CSM Committee Chair  
Daniel E. Erb, PT, PhD | Website Editor  
Kevin Brueilly, PT, PhD, MPT | JoPTE Co-Editor  
Kyle Covington, PT, DPT, PhD | APTA Board Liaison

### **Thank you to our leaders serving July 2020 – June 2021:**

Pamela K. Levangie, PT, DPT, DSc, FAPTA | President  
Christine McCallum, PT, PhD | Vice President and ELP Representative  
Lori Bordenave, PT, DPT, PhD | Secretary  
Chalee Engelhard, PT, EdD | Treasurer and ELP Representative  
Tamara Gravano, PT, DPT, EdD | Professional Development Representative-at-Large  
Karen Huhn, PT, PhD | Promotion & Communications Representative -at-Large  
Kimeran Evans, PT, DPT | Academic Faculty SIG Chair  
Teresa M. Cochran, PT, DPT, MA, GCS, FNAP | Academic Faculty SIG Vice-Chair  
Ashley Poole, CCS, PT | Academic Faculty SIG Secretary  
Teresa Miller, PT, BSPT, PhD | Academic Faculty SIG Nominating Committee Member  
Jamie Dehan, PT, PhD, DPT, MS | Academic Faculty SIG Nominating Committee Member  
Catherine Ortega, PT, ATC, EdD | Academic Faculty SIG Representative for Professional  
Development  
Ellen Costello, PT, PhD | Anatomy Educators SIG Chair  
Reivian Berrios Barillas, PT, DPT, PhD | Anatomy Educators SIG Membership Secretary  
Stephanie Muth, PT, PhD | Anatomy Educators SIG Recording Secretary  
Christine Conroy, DPT, PhD, FNAP | Anatomy Educators SIG Nominating Committee  
Kirsten Moisiso, PT, PhD | Anatomy Educators SIG Nominating Committee  
Karen Bock, PT | Clinical Education SIG Academic Co-Chair

Carol Lynn Beckel, PT, PhD | Clinical Education SIG Clinical Co-Chair and ELP Representative

Heather Mack, DPT | Clinical Education SIG Membership Secretary

Elsa Drevyn, PT, DPT | Clinical Education SIG Recording Secretary

Susan Tomlinson, PT, DPT | Clinical Education SIG Nominating Committee

Laurie Neely, PT, DPT | Clinical Education SIG Nominating Committee Chair

Jennifer Jewell, PT, DPT | PTA Educators SIG Co-Chair

Lisa Stejskal, PTA | PTA Educators SIG Vice Chair

Beverly Labosky, PTA | PTA Educators SIG Secretary

Justin Berry, PT, DPT, PhD | PTA Educators SIG Nominating Committee Chair

Karen Browning, PT | PTA Educators SIG Nominating Committee Member

Sara Virella Kraft, PT, DPT | Residency/Fellowship of Education SIG Chair

Jason Zafereo, PT, PhD | Residency/Fellowship of Education SIG Vice Chair

Chrysta Tomique Lloyd, PT, DPT | Residency/Fellowship of Education SIG Treasurer/Secretary

David Nolan, PT, DPT, MS | Residency/Fellowship of Education SIG Membership Secretary

Cheri Hodges, PT, DPT | Residency/Fellowship of Education SIG Nominating Committee Chair

Tara Dickson | Residency/Fellowship of Education SIG Nominating Committee

Christina Gomez, PT, DPT | Residency/Fellowship of Education SIG Communications Chair

Sarah Gilliland, PT, DPT, PhD | Scholarship of Education SIG Chair

Teressa Brown, DPT | Scholarship of Education SIG Vice Chair

Amy Yorke, PT, PhD | Scholarship of Education SIG Secretary

Tricia Prokop, PT, EdD, MS | Scholarship of Education SIG Nominating Committee

Kris Thompson, PT, PhD | Scholarship of Education SIG Nominating Committee

April D. Newton, PT, DPT | Nominating Committee Chair

Donni Welch-Rawls, PT, DPT, MS | Awards Committee Chair

Michael Buck PT, PhD, AT,C, Cert MDT, CSCS | Research Committee Chair

Scott Euype, PT, DPT, MHS, OCS | CSM Committee Co-Chair

Rebecca (Becky) McKnight | CSM Committee Co-Chair

Danille Parker, PT, DPT | ELC Committee Co-Chair

Cynthia Utley, PT, DPT | ELC Committee Co-Chair

Deanna Dye, PT, PhD | Web Site Editor

Kim Novak | Social Media Coordinator and Federal Affairs Liaison

Heather Mack, PT, DPT, PCS | Social Media Vice Coordinator

Angela M. Strickland, MSPT, DPT | Volunteers Coordinator

Susan Wainwright, PT, PhD | JoPTE Editor-in-Chief

Joyce Maring, PT, DPT, EdD | JoPTE Associate Editor

Mary Dockter | ACAPT Board Liaison

# Education Leadership Partnership Report

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**Chair/Lead:** Carol Beckel, Chalee Engelhard, & Christine McCallum

## 1. Completed Action Items in 2020:

- The Partnership accepted the Student Debt Task Force report and passed the following motions:
  - ACAPT, APTA, and AoE promote the use of the DPT Financial Fact Sheet Program Information in the Student Debt Task Force Report.
  - All academic programs provide to current and prospective students access to the financial literacy information available at the APTA Financial Solutions Center/APTA Enrich.
  - ACAPT, APTA, and AoE provide the FAQs in the report to prospective and current students and encourage their members to do so.
  - Partners' liaisons to CAPTE will discuss potential inclusion of the financial disclosure information in the Annual Accreditation Report.
  - Partners' liaisons will meet with CAPTE to request that information from the DPT Financial Fact Sheet be required to be posted on an academic program's web page.
- The Partners accepted a motion for voting representatives of each partner within ELP to share with the respective Boards the ACAPT Task Force Report regarding the need for a postdoctoral research fellowship for DPTs in lieu of the PhD.
- [GAMER](#) (Grantmanship and Mentorship in Education Research), a Partnership initiative, was not held in 2020. Mini-GAMER was offered as a preconference for ELC 2020.
- MERC (Medical Education Research Certificate) pre-conference course at CSM 2020 for the 7<sup>th</sup> time in 3 years with 37 participants.
- Education Research Network (ERN) met at CSM 2020. The Listserve included 156 participants. The Mentorship Program included 21 mentors and 43 mentees. The Academy of Education's Scholarship of Education SIG and ACAPT's Education and Pedagogy Consortium held joint meetings (SIGsortium) twice in 2020.
- As part of the Partnership's charge to develop a long-term strategic plan for physical therapy education, the Academic-Clinical Partnership meeting (March) was completed. A steering committee comprised of a representative from each of the Partners to gather outcomes from all preceding strategic meetings. ELP retained McKinely Advisors to review the work of the previous meetings and assist to identify themes, trends, and provide recommendations for future processes the Partnership can engage in strategic planning.
  - McKinely Advisors submitted a summary report and preliminary recommendations in September. The voting members of ELP and community partners completed several meetings to discuss next steps.
- The engagement of the reactor panel developed by the Outcomes Strategy Group to gather feedback on specific questions around the Domains of Competence and Entrustable Professional Activities (EPA) Panel Groups was delayed due to COVID-19.
  - Motion passed to provide funding for individuals representing the EPA Panel to attend virtual training.

- The Partnership had its second rotation of partner voting representatives in June 2020. Newly appointed members are Skye Donovan (APTA), Mary Dockter (ACAPT) and Christine McCallum (Academy).
  - The rotations continue to bring new perspectives and discussions on Partnership issues and how decision-making takes place.
- Budget: The Academy budgeted \$58,428.15 for Partnership-related expenses (33% of Partnership costs, shared with APTA and ACAPT) and projected \$14,190 in Partnership-related activities income for a net of (\$44,238.15).
- Adoption and published the 2019 ELP Annual Report
- ELP considered the impact of COVID-19 on academic programs including didactic innovations and clinical placement challenges.

## 2. Outstanding Items for action in 2021:

- Completion of the Culminating Strategic Meeting and report in 2021.
- Engagement of reactor panel to finalize the Domains of Competence and Entrustable Professional Activities in 2021.
- The 2020 Annual Report is targeted for approval at the Partnership's first post-CSM meeting, with subsequent dissemination through each partner's communications networks.

The annual report will include more detail than available in this summary.

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### Education Leadership Partnership Members

#### Voting Membership:

- ACAPT representatives:
  - Mary Dockter, PT, PhD
  - Nancy Reese, PT, PhD, MHSA (Chair)
  - John Buford, PT, PhD
- APTA representatives:
  - Susan Appling, PT, DPT, PhD
  - Skye Donovan, PT, PhD
  - Bob Rowe, PT, DPT, DMT, MHS
- APTE representatives:
  - Christine McCallum, PT, PhD
  - Carol Beckel, PT, PhD
  - Chalee Engelhard, PT, EdD, MBA

- ABPTS:
  - Julie Peterson, PT, DPT
  - Derek Stepp
- CAPTE representatives:
  - Candy Bahner
  - Pam Ritzline, PT, EdD
- Clinical community representatives:
  - Christopher Meachem, PT, DPT (VA)
  - Traci Norris, PT, DPT (AACPT)
  - Susan Ropp, PT, DPT (Health Sys Council)
  - Leigh Langerwerf, PT, DPT (PPS)
- FSBPT:
  - Nancy Kirsch, PT, DPT, PhD
  - Richard Woolf, PT, DPT

#### Nonvoting membership:

- ABPTRFE:
  - Noel Goodstadt, PT, DPT
  - Kendra Harrington, PT, DPT

PTA Education: Kathy Giffin, PTA, MEd

## 2020 Bylaws Revisions

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### *Revision Approvals*

Proposed amendments #1-7 were voted on during the Academy Annual Business meeting February 14, 2020 and approved by the membership. Amendments were sent to APTA and approved by the House of Officers on behalf of the APTA Board of Directors, effective June 8, 2020. Approved amendments are as follows:

#### #1. Board of Directors Composition

- This amendment "right sizes" the Board of Directors maintaining its 13 voting members and eliminating non-voting members.
- Best practices indicate that governance can be effectively administered and prudent decision making conducted with a board size of 11-15 people.
- Appointed leaders who have been non-voting Board members will maintain active two-way communication with the Board through an assigned Board liaison.
- This change will facilitate more efficient communication and decision-making, reduce the time-commitment burden on appointed leaders and significantly reduce the Academy's expenditure on travel reimbursement.

#### #2 Volunteers Coordinator

- The Volunteers Coordinator will function in a capacity similar to a Nominating Chair but for recruiting for volunteers as opposed to elected positions.

#### #3 Communications Committee

- A Communications Committee will pull together the elected and appointed positions with different communications responsibilities into a cohesive planning and decision-making unit.

#### #4 Alignment

- This amendment aligns current language in Bylaws with Bylaws changes, if amendments 1, 2 and 3 are adopted.

#### #5 Board Liaisons

- If the proposed downsizing of the Board of Directors is adopted, each member of the Board would have responsibility for communication with the leaders of one component as described in support statement, thus holding both the Board liaison and the component leader accountable for active communication.

#### #6 At-Large Representatives - Name Change

- This amendment changes the name of these two elected positions to "Director". This title identifies what have emerged over time as specific (rather than general) roles they serve as members of the Board of Directors.

#### #7 Annual Review of Accounts

- This amendment aligns bylaws with generally accepted accounting principles and the internal revenue service.

## 2021 Bylaws Revisions Synopsis

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Proposed amendments #1-5 will be voted on during the Academy annual business meeting February 25, 2021. In addition to this synopsis, members should read the support statements for each of the proposed amendments.

### **MOTION 2021-MEM-01:**

- #1 - That the Academy change its official name in all legal and relevant documents to APTA Academy of Education and that all documents, including the Academy Bylaws, delete reference to the Academy of Physical Therapy Education and replace with the new name: APTA Academy of Education. This is entirely so that we have a recorded vote for the Commonwealth of VA re: incorporation.

### **MOTION 2020-MEM-02:**

- #2 - That the Board approve the proposed strategy to include a second Academy delegate to the APTA House of Delegates, with Bylaws changes as presented to or amended by the Board at its September 2, 2020 meeting.
- #3 - That the Board approve the creation of the position of President-Elect, with Bylaw changes as presented to amended by the Board at its September 2, 2020 meeting.
- #4 - That the Board approve a change from 2-year to 3-year terms for all members of the Board of Directors with the exception of President and President-Elect-subject to approval of Motion 2020-BOD-13-with Bylaws changes as presented to or amended by the Board at its September 2, 2020 meeting.
- #5 - That the Board approve modification of the Bylaws to reflect contemporary practices and align with recent APTA changes to its Bylaws changes as presented to or amended by the Board at its September 2, 2020 meeting.

## *Bylaw Revision Detail*

### **For all:**

Required for Adoption: Previous Notice, 2/3 Vote

Component Contact: Christine McCallum

Phone: 330-490-7521

E-mail: [cmccallum@walsh.edu](mailto:cmccallum@walsh.edu)

Date: July 2020

## **PROPOSED BYLAW AMENDMENT #2**

### **PROPOSED CHANGE**

#### **Article IX. Delegates to the Association's House of Delegates**

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##### **Section 1: Qualifications**

- A. The qualifications of the Academy delegates shall be as stated in the Association's bylaws.
- B. The Academy Delegates may not, in the same year, serve as a Chapter or Assembly Delegate.
- C. The Academy shall notify Association headquarters of the name of the Academy Delegate, as required by the Association and the Standing Rules of the House of Delegates, via APTA Communities, HOD.

~~D. The Academy must be represented in the House of Delegates at least every third year.~~

### **Section 2: Selection and Term**

- A. The President of the Academy shall be the Academy's **chief** delegate to the Association's House of Delegates ~~unless unable to attend, then the responsibility shall be that of the Vice President.~~
- B. ~~The second Academy delegate to the Association's House of Delegates shall be appointed by majority decision of the Academy Board.~~
- C. ~~An alternate delegate shall be appointed annually by majority decision of the Academy Board after consideration of all applications received from Academy members.~~
  - 1. ~~The alternate delegate will serve in the place of the chief or second delegate if either is unable to attend the House of Delegates or is otherwise unable to serve.~~
  - 2. ~~The alternate delegate shall be automatically considered for Board appointment as the second Academy delegate in the year following service as alternate delegate.~~

### **Section 3: Duties of Chief and Second Delegates**

- A. ~~To attend the Annual and special meetings of the House of Delegates of the Association and any special meetings of delegates associated with the House of Delegates authorized by the Academy's Executive Committee.~~
- B. Etc.

### **SUPPORT STATEMENT:**

Per RC6-20, sections/academies one non-voting delegate to the House of Delegates is changed (effective HOD '21) to two (2) voting delegates [and an alternate delegate per usual].

- The Academy Executive Committee supports continuing to have the President serve as one of the two delegates (now serving as chief delegate) each year.
- This provision supports Board appointment of an alternate delegate each year, with the alternate moving into the second delegate position the following year. *NOTE: For the 2021 HOD, the Board will appointed both a second delegate and an alternate delegate, with the alternate delegate moving into the second delegate position in 2022.*
- The required affirmation (majority vote by the Board) gives the Board the flexibility to select someone other than the alternate delegate from the previous year when service of the alternate delegate the previous year falls short of expectations.
- Selection of the alternate delegate (or the second voting delegate in some years) by application permits any other member of the Academy (including current Board members) to submit their credentials and qualifications to the Board for consideration. This strategy allows the Board to select any Academy member whose qualifications, background or perspectives complement those of the Academy President, enriching caucus and HOD discussions, as well as representation of the Academy's votes. The application and selection processes will be stipulated in Policies and Procedures.
- The implication that attendance of the Academy delegate at the HOD is optional is outdated both in practice and now that there are votes to be cast by both delegates.

### **FISCAL IMPACT:**

The Academy will have to support attendance of a second delegate at the HOD regardless of the process by which that delegate is chosen.

### **PROPOSED BYLAW AMENDMENT #3**

**MOTION 2020-BOD-14:** That the Board approve the creation of the position of President-Elect, with Bylaw changes as presented to amended by the Board at its September 2, 2020 meeting.

## **PROPOSED CHANGE**

### Article VII. ~~Officers, Board of Directors, Executive Committee, and Officers~~

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#### **Section 41: Board of Directors**

##### A. Composition

The Board of Directors shall be comprised of the ~~Executive Committee~~ **President, President-Elect, Vice President, Secretary, Treasurer**, Director for Communications and Promotion, Director for Professional Development, Chairs of Special Interest Groups ~~with one (1) vote per Special Interest Group~~, and the Chair of the Nominating Committee.

1. ~~Each member of the Board shall carry one (1) vote except the Clinical Education Special Interest Group Co-Chairs who shall carry only one (1) vote between them.~~
  - a. ~~If the President-Elect is completing service in another position on the Board (i.e., holding two positions on the Board) that person shall have only one (1) vote on the Board of Directors.~~
2. ~~No member shall hold more than one position on the Board of Directors except the person serving as President-Elect if they are concluding service in another Board position.~~
  - a. ~~If the President-Elect holds a position on the Board at the time of election, that person may complete that term so long as that term ends before the President-Elect assumes the position of President.~~

##### D. Terms of Office

1. ~~The officers~~ **Members of the Academy Board** shall serve for two-year terms or until the election and succession to office of their successors ~~except the President and President-Elect.~~
2. ~~The President-Elect shall serve a 1-year term, followed immediately by a 2-year term as President.~~

##### E. Section 2: Vacancies

3. ~~In the event of a vacancy in the office of President, the President-Elect shall succeed to the Presidency for the unexpired portion of the President's term as well as the remaining two (2) years of the term to which the President-Elect was elected.~~
  - a. ~~In the event of a vacancy in the office of the President in a year when there is no President-Elect or if the President is also the President-Elect, the Vice President shall succeed to the Presidency for the unexpired portion of the term.~~

#### **Section 2: Executive Committee**

##### A. Composition

The Executive committee shall be comprised of the President, **President-Elect**, Vice President, Secretary, and Treasurer.

#### **Section 3: Officers: Rights, Duties, and Responsibilities**

##### C. President-Elect

~~The President-Elect shall learn the responsibilities of the President by attending all Board and Executive Committee meetings, as well as other meetings per request/authorization of the President and Executive Committee.~~

## **SUPPORT STATEMENT:**

It is generally agreed that it takes a full year to learn the responsibilities of a new position and one's role as a member of the Academy Board. This is particularly true for the position of President where the scope of responsibilities and authority are broader, potentially increasing the learning curve. By having a year "in training", the incoming President has the opportunity to learn from the current

President over a one-year period, thus enhancing continuity where appropriate and better serving the needs of the Board, the Academy and its membership upon assuming the Presidency. By giving the President-Elect a Board and Executive Committee vote, that individual has a stake in engagement and participation, while simultaneously having the same transparency in decision-making as the other members of the Board.

Of the 18 sections/academies, 14 have either a President-Elect (n=5), a Past President (n=7), or both (n=2). The Executive Committee is recommending a President-Elect rather than a Past President because the Past President position does not provide the one-year learning opportunity. Further, a Past President might exert undue influence on the new President during the President's first year of service.

### **FISCAL IMPACT:**

The Academy will need to support travel for an additional Board member to key meetings (e.g., ELC, CSM and, potentially, APTA's Fall Leadership Conference). Although expenses vary with sites, this might be estimated at approximately \$6000 per year (assuming onsite conference). This additional cost is offset somewhat by the reduction in Board travel resulting from elimination of non-voting Board members (Bylaws 2020) who are now supported for fewer days, if any, at each conference.

## **PROPOSED BYLAW AMENDMENT #4**

**Date:** August 2020

**MOTION 2020-BOD-15:** That the Board approve a change from 2-year to 3-year terms for all members of the Board of Directors with the exception of President and President-Elect-subject to approval of Motion 2020-BOD-13-with Bylaws changes as presented to or amended by the Board at its September 2, 2020 meeting.

### **PROPOSED CHANGE**

*NOTE: The changes below in some cases presume passage of the Bylaw amendment (#3) that adds a President-Elect. If that motion doesn't pass, the wording below will be amended accordingly.*

## **Article VII. Officers, Board of Directors, Executive Committee, and Officers**

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### **Section 41: Board of Directors**

#### **F. Terms of Office**

3. ~~The officers~~ **Members of the Academy Board** shall serve ~~for two-year terms~~ **3-year terms** or until the election and succession to office of their successors, **with the exception of the President and President-Elect.**
4. **The President-Elect shall serve a 1-year term, followed immediately by a 2-year term as President.**

#### **G. Elections: [See Table for Implementation Priviso]**

3. **Academy Board shall be elected on the following 3-year cycles (effective 2024<sup>1</sup>) except the President and President-Elect.**
  - b. **Cycle 1: Election of the Treasurer, Chairs of the Anatomy Educators and Residency/Fellowship Education, and the Academic Co-Chair of the Clinical Education Special Interest Groups.**
  - c. **Cycle 2: Election of the Vice President, Director for Communications and Promotion, and Chairs of the Academic Faculty and PTA Educators Special Interest Groups**
  - d. **Cycle 3: Election of the Secretary, Director for Professional Development, Chair of the Scholarship of Education and Clinical Co-Chair of the Clinical Education Special**

**Interest Groups.**

- e. The President-Elect will be elected on even-numbered years (effective 2024<sup>1</sup>).
- f. A new member of the Nominating Committee shall be elected annually.

**PROVISO TABLE:** The following strategy will be used to phase in the new 3-year election cycle.

Year	Pres.	Pres-Elect	Vice-Pres	Sec't	Treas	Dir. Com Prom o	Dir. Prof Dev'l	SIG Chairs (CiCE /SOE)	SIG Chairs (AF/PTAE)	SIG Chairs: (AcCE/AE/RF E)
Grey: Position up for election (phase in)						Orange: Cycle 2 Elections				
Green: Cycle 1 Elections						Teal: Cycle 3 Elections				
2021 <sup>1</sup>	Y2 of 3	NA	Y2 of 2	Y1 of 2	Y1 of 3	Y2 of 2	Y1 of 2	Y1 of 2	Y1 of 2	Y2 of 2
2022 <sup>2</sup>	Y3 of 3	Y1 of 3	Y1 of 3	Y2 of 2	Y2 of 3	Y1 of 3	Y2 of 2	Y2 of 2	Y2 of 2	Y1 of 2 <sup>3</sup>
2023	Y2 of 3	NA	Y2 of 3	Y1 of 3	Y3 of 3	Y2 of 3	Y1 of 3	Y1 of 3	Y1 of 2 <sup>3</sup>	Y2 of 2
2024 Cycle 1	Y3 of 3	Y1 of 3	Y3 of 3	Y2 of 3	Y1 of 3	Y3 of 3	Y2 of 3	Y2 of 3	Y2 of 2	Y1 of 3
2025 Cycle 2	Y2 of 3	NA	Y1 of 3	Y3 of 3	Y2 of 3	Y1 of 3	Y3 of 3	Y3 of 3	Y1 of 3	Y2 of 3
2026 Cycle 3	Y3 of 3	Y1 of 3	Y2 of 3	Y1 of 3	Y3 of 3	Y2 of 3	Y1 of 3	Y1 of 3	Y2 of 3	Y3 of 3

<sup>1</sup>As dictated by 2019 Bylaws change; new Bylaws to be voted upon

<sup>2</sup>2021 Bylaws change initiated

<sup>3</sup>Modified term to create 3 cycles dictated by 2021 Bylaws change

**SUPPORT STATEMENT:**

It is generally agreed that it takes a full year to learn the responsibilities of a new position and one's role as a member of the Academy Board. With 2-year terms, a Board member spends one year learning their role, with only one additional year of experienced leadership prior to either leaving office or committing to a second 2-year term. A 3-year term allows 2 years of experienced leadership (after the 1-year learning curve) before leaving office or committing to a second 3-year term.

It has been proposed that 3-year terms might discourage individuals from running for a second term given the overall 6-year commitment. However, having served 3 years (rather than 2 years) in office may also reduce the feeling of commitment or obligation to further their current role in the Academy that can drive a decision to run for second term. If 3-year terms reduce the number of Board members running for a second term, there is a corresponding potential benefit of encouraging more members to accept a nomination for a position when not running against an incumbent. Changing from two 2-year terms to an increased number of single 3-year terms reduces experienced leadership in that position by only 1 year, but also may increase the turnover of Board members to the possible benefit of the member representation and member opportunities.

Of the 18 sections/academies, 14 have 3-year terms for their Board members (except where President-Elect, President or Past President terms differ).

**FISCAL IMPACT:** None

## PROPOSED BYLAW AMENDMENT #5

### **PROPOSED CHANGES**

Bylaws of **APTA** the Academy of Physical Therapy Education, Inc.  
**A Component** of the American Physical Therapy Association

## Article VI. Meetings

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### *Section 1: Annual Meeting*

There shall be one (1) Annual Meeting of the Academy held for the purpose of conducting the Academy's business and other activities in accordance with the purpose and functions of the Academy.

- A. The Annual meeting of the Academy shall be held at the time and place of the Combined Sections Meeting (CSM) of the Association. ~~The specific time of the Annual meeting shall be designated by the Academy's Program Chairperson or designated representative of the Academy of Physical Therapy Education and the Combined Sections Meeting's Program Committee.~~ If in the event the Combined Sections Meeting does not take place, the Academy shall **may** hold the Annual Meeting at the Education Leadership Conference (ELC) **or virtually at a time and date approved by the Executive Committee.** ~~If both CSM and ELC are not held the Academy's Annual meeting shall be held at the time and place of the annual session of the Association's House of Delegates.~~
- B. Attendance at Academy business meetings is limited to Academy members and guests approved by the Board of Directors.

### *Section 2: Special Meeting(s)*

A special meeting (**whether onsite or virtual**) may be called by five (5) members of the Board of Directors or must be called upon written petition of 50% of the membership.

### **Section 4: Quorum**

Physical Therapist, Retired Physical Therapist, Life Physical Therapist, Physical Therapist Assistant, Retired Physical Therapist Assistant, and Life Physical Therapist Assistant members of the Academy shall have the privilege of voting at such meetings of the Academy. A quorum will be twenty-five (25) members, including five (5) members of the Board of Directors **for onsite meetings; for virtual meetings, 10% of the membership shall be in attendance.**

## Article VII. ~~Officers,~~ Board of Directors, Executive Committee, and Officers

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### *Section 41: Board of Directors*

#### A. Composition

The Board of Directors shall be comprised of the Executive Committee (see Section 3a), Director for Communications and Promotion, Director for Professional Development, Chairs of Special Interest Groups ~~with one (1) vote per Special Interest Group,~~ and the Chair of the Nominating Committee.

**4. Each member of the Board shall carry one (1) vote except the Clinical Education Special Interest**

Group Co-Chairs who shall carry only one (1) vote between them.

D. Meetings

3. Notice Requirements: Written notice of all meetings of the Board of Directors and Executive Committee shall be provided by the Executive Director and transmitted electronically (or by phone upon request), and mailed, per request, to all members not later than ten days before the date fixed for the meeting.
4. Quorum: A minimum of seven (7) Board members carrying seven (7) votes, including at least two members of the Executive Committee, shall constitute a quorum.
5. Voting: When a decision is needed between meetings of the Board of Directors voting may be conducted by telephone or an electronic medium, and mailed, per request.

B. Terms of Office

4. The All officers shall assume office on July 1<sup>st</sup> following the Academy and special interest group elections.

**Section 52: Executive Committee**

C. Meetings

3. Notice Requirements: Written notice of all meetings of the Executive committee shall be transmitted via an electronic medium, and mailed upon request, to all members not later than ten days before the date fixed for the meeting.
5. Voting: Voting may be conducted by telephone or an electronic medium, and mail, per request. When a decision is needed between meetings of the Executive Committee voting may be conducted by, telephone or an electronic medium, and mail, per request.

**Article XVIII. Elections**

**Section 1: Process**

- B. A ballot of nominees, consenting to serve, and candidate statements for each office shall be posted on the APTA Academy of Physical Therapy Education, Inc., website and members notified electronically, and by mail, per request, no later than six weeks after the conclusion of the Annual Business meeting at APTA Combined Sections Meeting. To request a notification of the candidate slate and statements or mail ballot, a member shall contact the Executive Officer of the APTA Academy of Physical Therapy Education, Inc., in writing no later than April 1<sup>st</sup> each election year.
- C. Slates shall be announced at the Annual meeting of the Academy of Physical Therapy Education, Inc., at the APTA Combined Sections Meeting, at which time nominations shall be taken from the floor.
- H. Newly elected officers shall participate in the formal installation ceremony a Board orientation at the next first meeting of the Academy of Physical Therapy Education, Inc., following the election Board after assuming office.

**Section 2: Voting Body**

- A. Election for each office or position shall be by a plurality of the valid votes cast by the announced deadline. In the case of a tie, the election shall be settled by lot. The voting body shall be composed of all members of the Academy who have voting privileges in the Association.
- B. The vote is conducted by electronic medium, or mail, per request, as provided for in Section X. A minimum of 100 ballots shall be required for the election to be valid. Membership shall be cued, via electronic means, a maximum of three times, to vote.

**Article XI. Finance**

**Section 3: Dues**

- A. Dues will be reviewed periodically by the Executive Committee. Proposed changes to dues shall be

approved by the Board of Directors by majority vote and become effective in the next fiscal year following approval.

- B. All dues shall be for the period specified in the Association Bylaws and shall be payable following the **Association's** schedule.
- ~~C. All dues changes approved by the Academy membership and approved by the Association's deadline will become effective on the first of the Association's next fiscal year.~~
- ~~D. The Board of Directors may offer reduced rates for Academy dues as an incentive to promote membership.~~

**SUPPORT STATEMENT:**

All the changes as presented are to clarify language or align Academy bylaws with current practice, and others by recent changes by the House of Delegates to APTA bylaws. The rationale for changes includes:

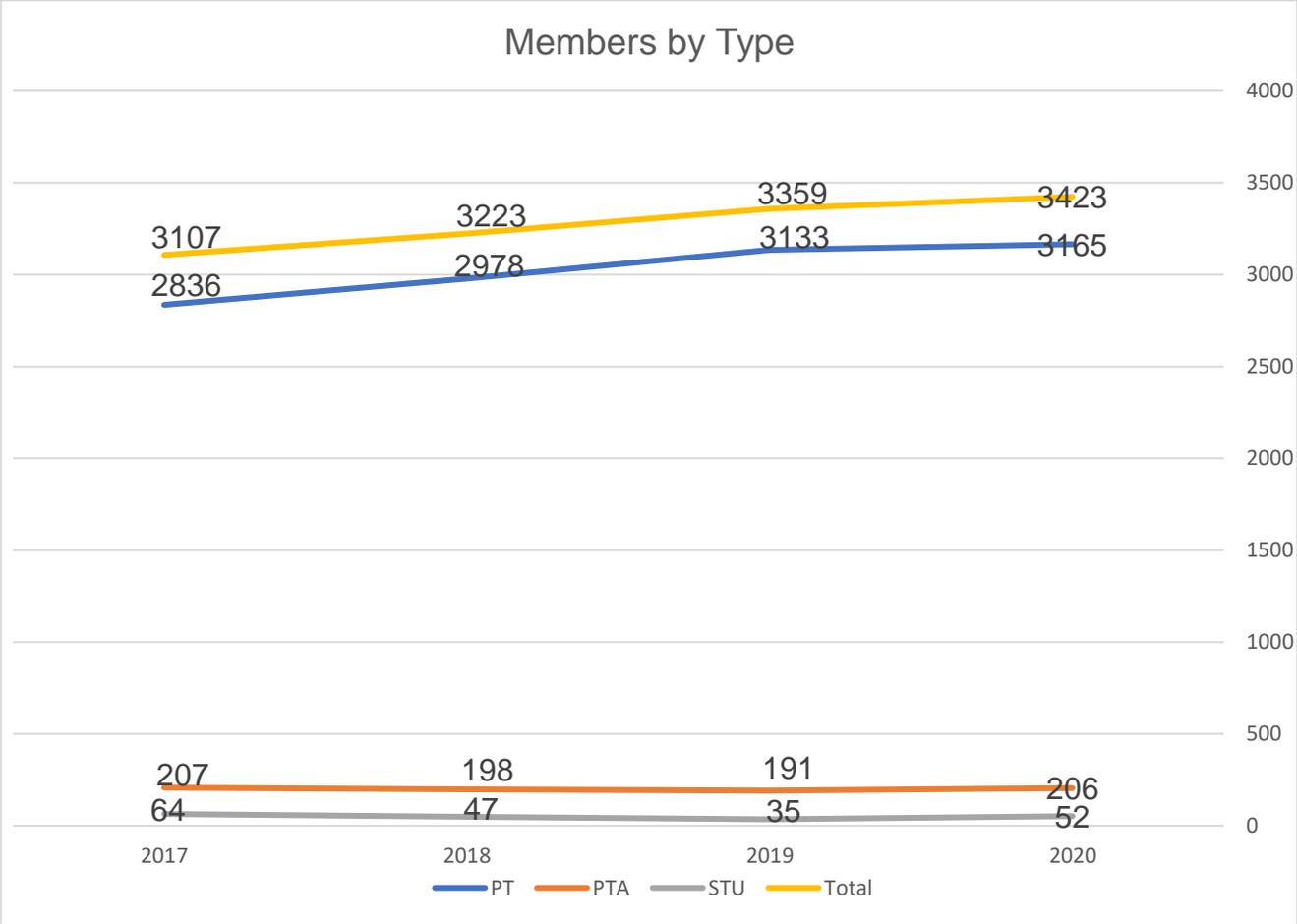
1. Change of the Academy name from Academy of Physical Therapy Education to APTA Academy of Education (per APTA-leading alignment). *NOTE: Not all such changes are captured here but will be appropriately edited through the bylaws document.*
2. Move to options of onsite or virtual meeting on flexible dates or times (e.g., Annual Meeting may not take place at CSM).
3. Stipulation of a quorum (10%) of membership in attendance at a virtual meeting per the quorum requirements of our Articles of Incorporation in the Commonwealth of Virginia.
4. Removal of the option of mailed notification of meetings. This option no longer seems to be necessary given universal access of our membership to email.
5. Per RC2-20, reference to specific dues amounts are removed from bylaws and will be moved to policy.

**FISCAL IMPACT:**

The only change with a fiscal impact is the Academy name change. However, the name change was previously approved by the Academy Board and presented to the membership at the 2020 Annual Business Meeting. Most of the associated costs to convert logo/brand assets were covered in the 2020 budget.

There are no costs associated with moves to virtual meetings for ≤100 participants given the Academy's current Zoom account. However, the subscription would need to be increased to accommodate ≤500 the Annual Business Meeting at an increa

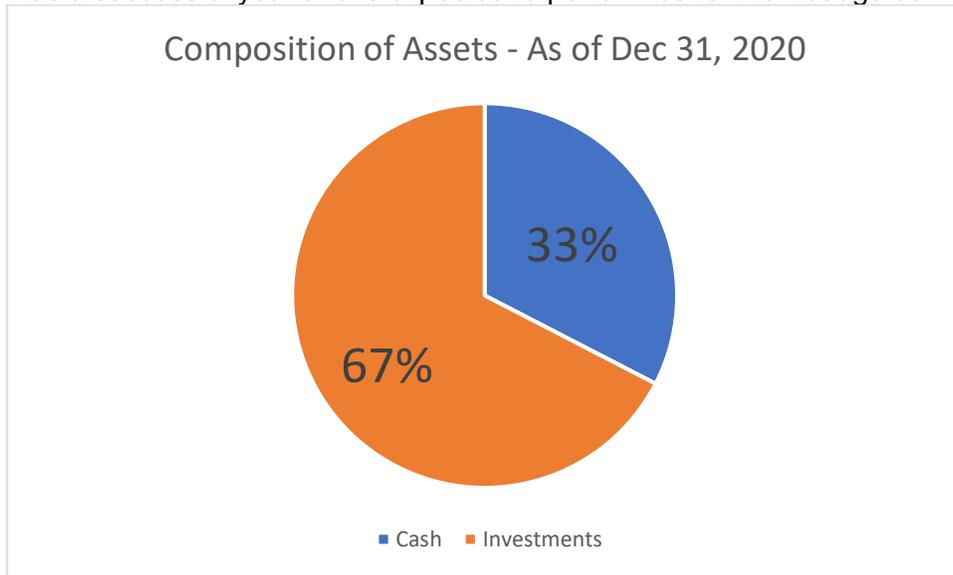
# 2020 Year End Membership



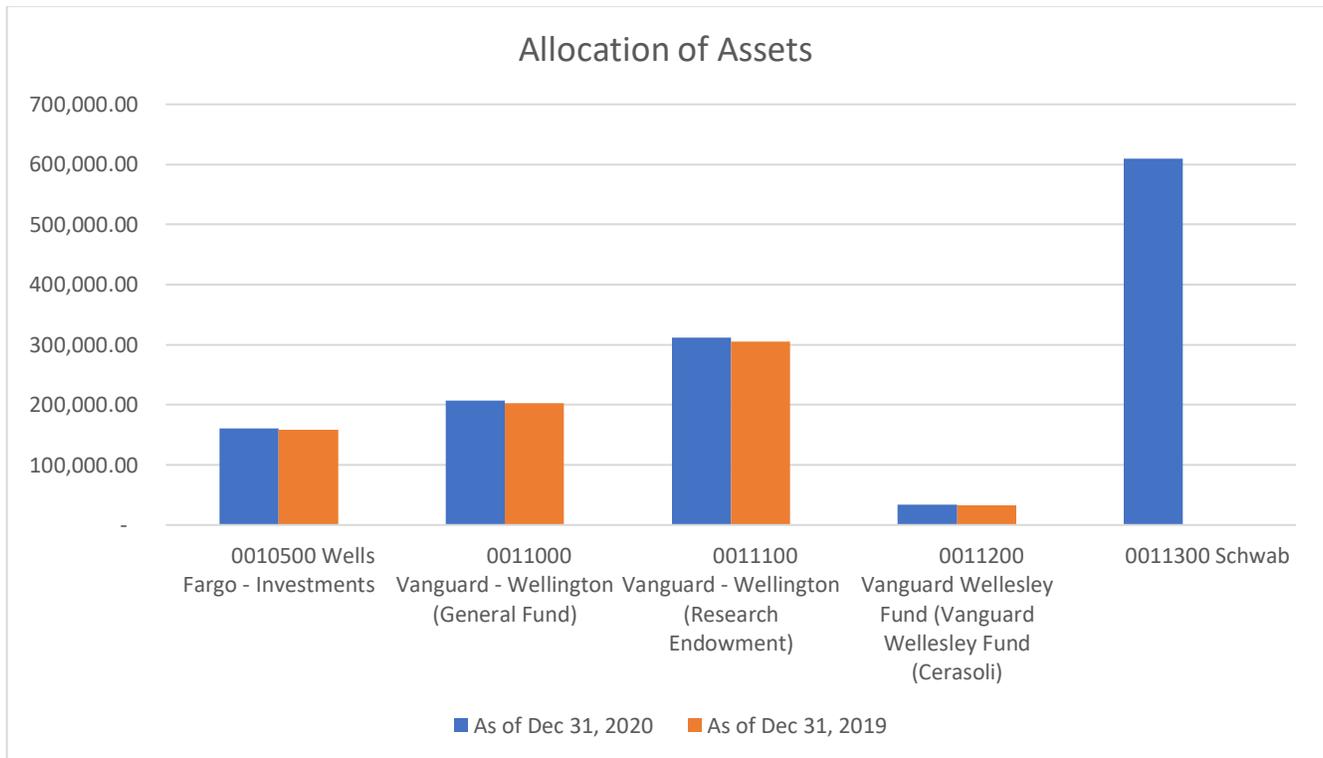
- Total Academy membership have grown steadily over this 2020. Net change from 2017 to 2020:
  - Total: 9.23% growth
  - PT: 10.4% growth (1% increase over 2019)
  - PTA: even (7% increase over 2019)
  - Student: 12% loss (32% increase over 2019)

## 2020 Year End Financial Performance

Overall, 2020 was a successful year and is expected to perform better than budgeted.

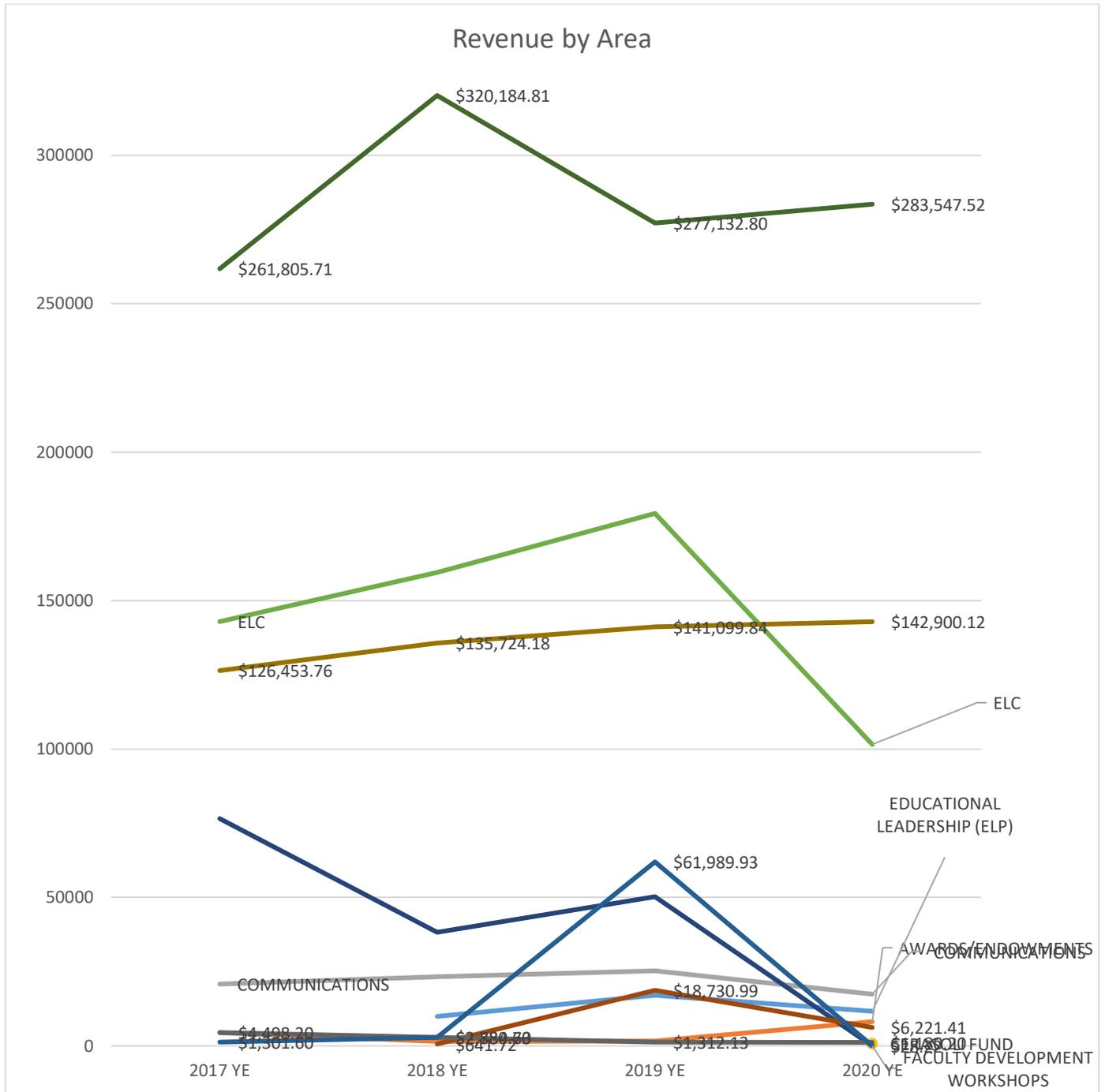


- The Schwab account was opened and \$610,000 was moved from cash to investments. We also opened a Reserve account and move \$100,000 from the operating account to reserves. As of 2020 year-end, roughly 33% of assets were in cash and 67% in investments.

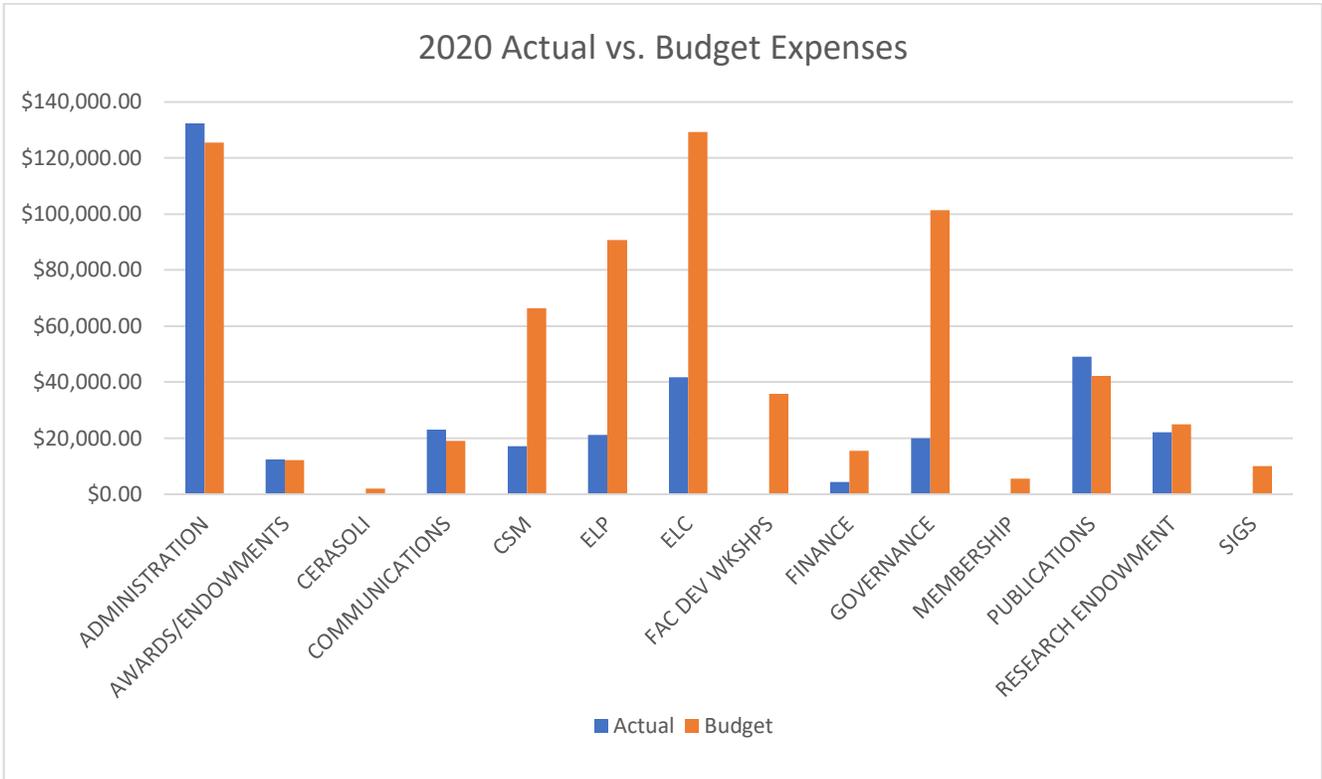


- With the specific allocation as noted above, investments performed well in 2020 despite COVID19.

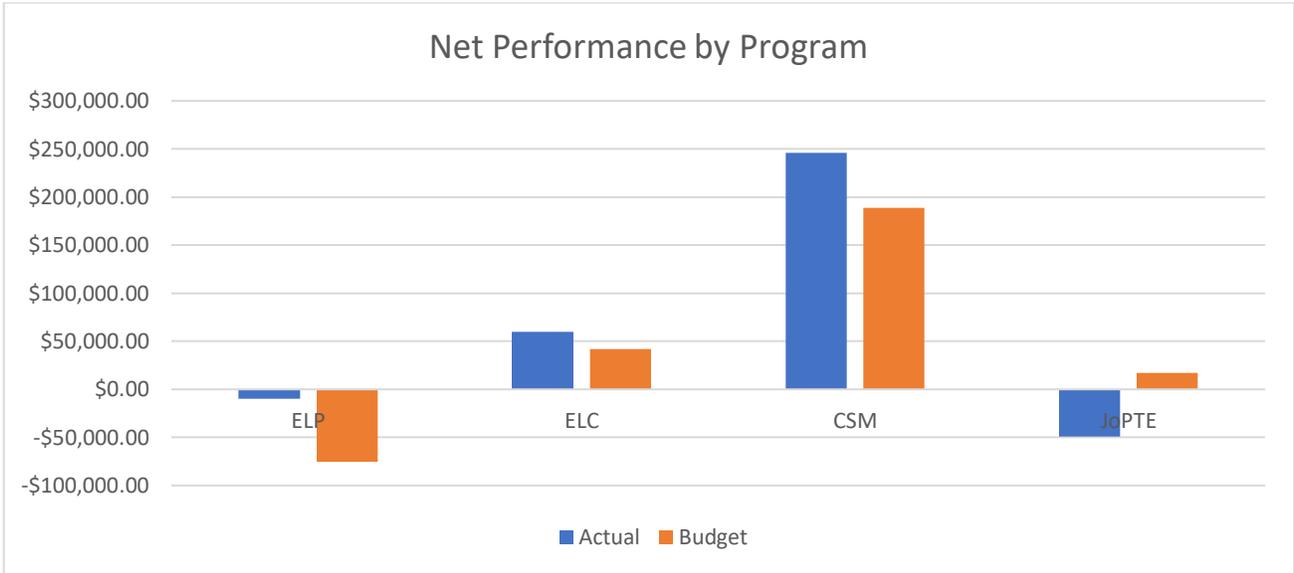
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- Most areas of operations saw better than budgeted performance, and many saw an increase from 2019. Areas of decline were due to COVID19 and programs cancelled or decreased fees due to virtual conference.
- “Publications” do not include JoPTE royalties which were not received at the time of reporting.
- CSM revenue had increased in 2020 as well as membership income.

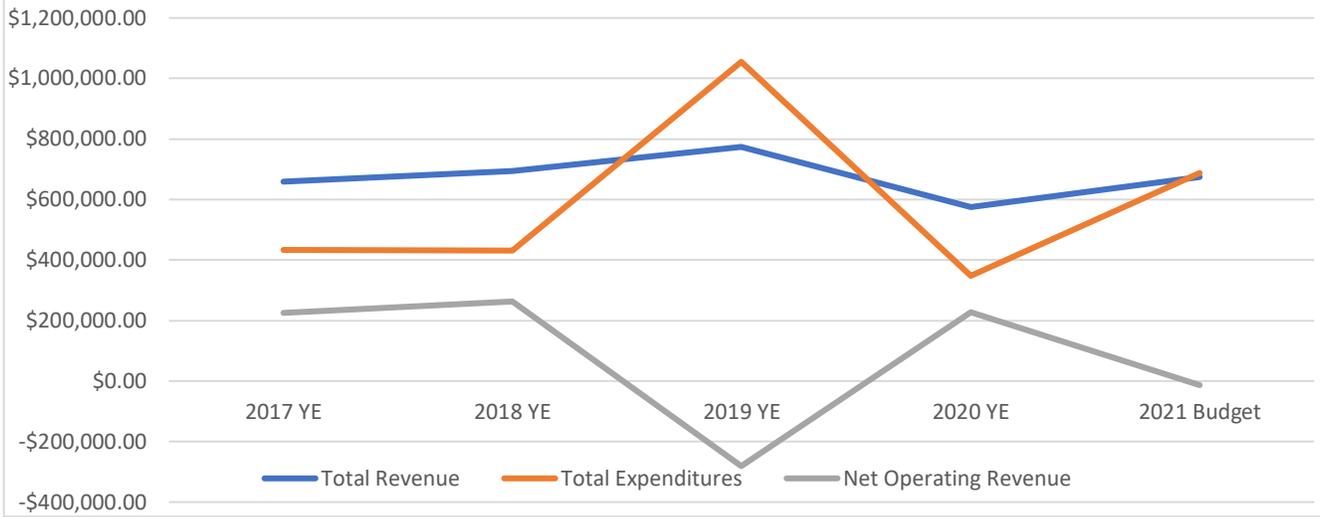


- Expenses had many categories which fared better than budget. Mostly due to cancelled programs or cancelled travel expenses due to virtual meetings.



- Our highest performing programs are CSM and ELC.
- Mid-Career Faculty Development Workshop cancelled due to COVID19.

### Summary Performance 2017 Actual - 2021 Budget



- Even though total revenue was down due to COVID19, expenses were also down 50%.
- The net operating revenue for the year resulted in a net revenue approximately \$227,212.  
\*The reports do not show the final for 2020. JoPTE royalties to be received.

# Officer & Director Reports

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## President Report

**Chair/Lead:** Pamela Levangie

### 1. Completed Action Items in 2020:

- **Changes to the Academy Board of Directors:**
  - With approval of the membership and APTA BOD, our Board was reduced from 23 individuals (including 14 voting members (13 votes) and 9 non-voting members) to 14 members (13 votes) as of July.
  - To maintain strong communications, each member of the Board serves as a Board liaison to one component (SIG or committee) of the Academy, with responsibility for 2-way communication to and from the Board.
- **Communications Committee:** With the accepted bylaw change in 2020, the Communications Committee began its service as a new Academy standing committee. [Goals 3 and 4]
  - The Committee includes the Director of Communication and Promotion (Committee Chair), the website editor, the Social Media Coordinator(s), the Volunteers Coordinator, and the social media coordinator of the JoPTE Editorial Board.
- **Academy/ACAPT Board Liaisons:** [Goals 1-4]
  - The Academy's and ACAPT's appointed board liaisons began attending both their own and the other group's board meetings, with a sense of improved communication.
- **Academy Anniversary:** In April, the Board approved a motion designating 1941 as its year of formation. [Goal 4]
  - At the 20<sup>th</sup> Annual Conference of the American Physiotherapy Association, the conference program included a session titled: *Problems of Physical Therapy Schools*. At the 21<sup>st</sup> annual meeting the following year, the conference program listed a meeting of the *Physical Therapy Schools Section*.
  - With the passage of this motion, June 2021 will be the 80<sup>th</sup> anniversary of the Academy.
- **Nardone Consulting Group (NCG):** [Goal 4]
  - With the departure of Sarah Berke after the birth of her daughter in May, we welcomed Terry Dougherty as our new Executive Director with the continued support of Sherry Battle as Association Manager.
  - NCG conducted a survey of Academy leadership to assess NCG's managerial services. Results will be presented to the Executive Committee in January.
- **Leaders Leaving Office:** The following individuals concluded their current leadership positions in the Academy with the sincerest thanks for their service. [Goal 4]
  - Kevin Brueilly: JoPTE Co-Editor (3 years)
  - Skye Donovan: CSM Program Co-Chair (2 years) – beginning her term as APTA Director.
  - Dan Erb: Website Editor (>3 years)
  - Lynn Fitzgerald: Awards Committee (3 years including the last year as Chair)
  - Kai Kennedy: At-Large Delegate for Communications and Promotion (4 years)
  - Laurie Kontney: Education Leadership Partnership representative (4 years)
  - Dana McCarty: Nominating Committee (3 years including the last year as Chair)
  - Corrie Odom: Vice President (4 years)
  - Kathy Rockefeller: Research Committee (4 years including the last 2 as Chair)
  - Donna Skelly: Founding Chair, Anatomy SIG (3 years)
  - Rhea Cohn: Federal Affairs Liaison (2019, 2020)

- **New Appointments in 2020:** The following new 3-year appointments (7/2020-6/2023) were made: [Goal 4]:
  - Awards Committee: Tiffany Kiphart and Eric Sawyer
  - Education Leadership Partnership (Academy representative): Christine McCallum (VP)
  - Finance Committee: LaDarius Woods
  - Research Committee: Michael Buck (Chair), Yi-Po Chiu, Sean Gallivan and Diana Veneri
  - CSM Program Co-Chair: Scott Euype (finishing Skye Donovan's remaining term as well as an additional 2 years.
  - Website Editor: Deanna Dye
  - Volunteers Coordinator: Angela Strickland
  - Federal Affairs Liaison for 2021: Kim Novak
  - Health Promotion and Wellness Council Liaisons to their Leadership Panel: Rebecca Rebitski
- **JoPTE:** With the conclusion of the 3-year contract with JoPTE Co-Editors, Kevin Brueilly and Susan Wainwright, a new organizational structure for the Editorial Board has been implemented. [Goals 1 and 2]
  - Susan Wainwright concluded an initial 6-month term (July-December 2020) as Editor-in-Chief and signed a 2-year contract renewal (through December 2022).
  - Joyce Maring served an initial 6-month term (July-December 2020) as Associate Editor and signed a 2-year contract renewal (through December 2022).
  - We contracted with KWF Editorial for an initial 2-year period (through 2022) to support the Editor-in-Chief, Associate Editor and Editorial Board through the part-time services of a Managing Editor of JoPTE.
- **Geneva J. Johnson Forum at ELC:** [Goal 1]
  - The Academy and ACAPT completed a joint written agreement with the Physical Therapy Leadership Institute (PTLI) to clarify the mutual responsibilities of and conditions for their support of the Forum at ELC.
- **Centennial Celebration:** [Goals 3 and 4]
  - A \$100 contribution to **APTA's Dimensions in Diversity Fund** was made to qualify the Academy for recognition on the Community Wall in APTA's new headquarters.
  - A \$500 sponsorship of the APTA California's physical therapy centennial float in the 2021 Rose Bowl Parade was made.
  - **Centennial Scholar:** The Academy selected two APTA Centennial Scholars. [Goals 3 and 4]
    - Amy Schubert, PT, DPT (University of Wisconsin, Madison) will be combing Academy archival resources to create a timeline of and database for historical events, actions, and volunteer leadership. The goal will be to ultimately provide accessible documentation of the evolution of the Academy as a volunteer organization serving physical therapy education.
    - Emily Reynolds, PT (NovaCare Rehabilitation, Westerville, OH) will be assigned a role in the PTA Education Summit (currently in planning stages) tentatively scheduled to take place in 2021.
  - The Executive Committee approved sponsorship of a table at the **Centennial Gala**, September 10, 2021 (\$5,000), subject to the impact of COVID on the live event.
  - **Founders Day Celebration:** The Academy will join ACAPT in conducting a virtual celebration on the evening of Founder's Day (January 15, 2021).
    - A joint task force was appointed to plan the event, including Scott Burns from ACAPT, and Diane Jette and Peggy Gleeson from the Academy.

- The Academy contributed a short video wishing APTA a “Happy 100<sup>th</sup> Anniversary” to be posted along with greetings from other APTA component groups.
- **CAPTE: [Goal 3]**
  - A letter of Board support was sent to CAPTE in April for changes to Standards 6K and 6L in CAPTE’s *PTA Standards and Elements*. to reflect the associate degree as the *minimum* (rather than absolute) requirement for PTA education programs.
  - After the CAPTE meeting in November, we were informed that the Commission voted to defer the decision regarding the appropriate degree to confer on PTA graduates to the planned 5-year review of the Standards and Required Elements (SREs).
- **PTA Education Summit: [Goals 1, 3 and 4]**
  - As a strategic priority set by the Board, a Planning Task Force for a projected 2021 PTA Education Summit was formed and charged, with initial meetings taking place in March and April.
  - Task Force charge: “The PTA Education Summit Planning Task Force is charged by the Board of Directors of the Academy of Physical Therapy Education to plan a [summit](#), the goals of which are to engage relevant stakeholders to identify strengths and challenges in contemporary physical therapist assistant (PTA) education, and to formulate prioritized recommendations for future work to advance PTA education to better meet the demands of contemporary physical therapy practice. A full report from the Task Force (including a completed summit proposal) is due to the President by December 1, 2020 for subsequent Board approval.
  - Task Force, each representing one or more key stakeholders: Kathy Giffin (Chair), Justin Berry, Holly Clynch, Susan Cotterman, Roger Herr, Amy Smith Hamel, and Doreen Stiskal.
  - See Task Force Report for accomplishments to date.
- **Second Academy Delegate:** With the passage of RC 6-20, sections/academies will have a 2<sup>nd</sup> delegate at the House of Delegates, with both delegates having a vote in the HOD.
  - The Board will recommend a Bylaw change to the membership in 2021 to determine the selection process for the 2<sup>nd</sup> delegate.
  - The Board approved Carol Beckel as the 2<sup>nd</sup> delegate to the 2021 House of Delegates (pending approval of the new bylaw) since business of the ’21 HOD began in late summer 2020 via APTA’s Hub.
- **Guidelines and Assignment of Copyright Policy [Goal 4]**
  - The Board approved a Guidelines and Assignment of Copyright Policy for work done by individuals or groups in their role(s) as Academy volunteers.
- **Joint Meeting of Academy and ACAPT Executive Committees [Goals 1-4]**
  - The Academy’s Executive Committee and Executive Director met on November 30<sup>th</sup> with ACAPT ‘s Executive Committee and Executive Director on November 30<sup>th</sup>.
  - An additional joint meeting will take place in January to continue the discussion of strategies to minimize overlapping activities, determine areas for effective collaboration, and clarify our respective roles for our own constituents and external stakeholders.

## 2. Outstanding Items for action in 2021:

- **Health Promotion and Wellness Council Liaison to Leadership Panel:** An open call will be made for a PTA educator to serve as the Academy’s second liaison.
- **Update on New Academy Name and Logo: [Goal 4]**
  - We will be putting the new Academy name up for a member vote at the February Annual Business Meeting. Although approved by our BOD and presented at the 2019

Business Meeting, our articles of incorporation with the Commonwealth of Virginia requires that we include a member vote to make the formal name change. Our new name will still be used in the interim.

- **Academy Anniversary:** [Goal 3]
  - The Communications Committee will take on responsibilities for plans to mark our 80<sup>th</sup> anniversary during 2021.
- **Strategic Planning for 2022-2024** [Goals 1-4]
  - A facilitated strategic planning meeting is tentatively scheduled for the end of June 2021.
- **Nardone Consulting Group (NCG) Contract** [Goal 4]
  - A draft of a new 2-year contract will be reviewed in January without any anticipated substantive changes.

### 3. Resources or actions anticipated to require BOD approval in 2021:

- **Proposed Changes to Bylaws:** See Vice President's Report

## *Vice President Report*

**Chair/Lead:** Christine McCallum

### 1. Completed Action Items in 2020:

1. Academy Bylaws approved. [goal 4]
  - Seven bylaw amendments presented to membership February 2020 and all passed without opposition, including Academy name change - "APTA Academy of Education"
  - Academy bylaw amendments approved by APTA Board of Directors June 8, 2020.
2. Policy and Procedure Updates completed. [goal 4]
  - SIG General Policies updated (June 2020).
  - Awards Committee Policy and Procedures updated (June 2020).
  - Finance and Investment Policy updated. (June 2020).
  - Nominating Committee Policy and Procedures updated.
  - Research Committee Policy and Procedures updated. (June 2020).
  - Director of Professional Development (November 2020)
  - Director of Communications and Promotion position description (November 2020)
  - Communications Committee (November 2020)

### 2. Outstanding Items for action in 2021:

Four 2020-21 Academy Bylaw amendments were presented to the BOD and approved at the September BOD meeting. Bylaw revisions will be presented to membership during the February 2021 annual meeting. (Goal 4).

These include:

#1. Modification of bylaws to reflect contemporary practices and alignment with recent APTA bylaw changes. This amendment includes 1. options for onsite or virtual meetings, 2. removal of option of mailed notification of meetings and 3. name change to APTA Academy of Education. These amendments align with recent APTA recommendations changes.

#2. Inclusion of a second Academy delegate to the APTA House of Delegates. This amendment permits the Board to select a second delegate to represent the Academy within the House of Delegates, alongside the President as chief delegate.

#3. Creation of the position of President-Elect. This amendment supports a training year for the incoming President to the Academy. The President-Elect will be a Board and Executive Committee vote. The inclusion of this position aligns with other sections/academies that support training for an incoming President.

#4. Shifting the terms of office of all academy board members from 2 years to three years. This change would enhance leadership development and continuity of Board leadership for an extended period of time.

### **3. Resources or actions anticipated to require BOD approval in 2021:**

- None at this time

## ***Treasurer Report***

**Chair/Lead:** Chalee Engelhard

### **1. Completed Action Items in 2020:**

- Performed RFP and selected DiMeo, Schneider and Associates to manage Academy's funds. As a result, accounts have been established in accordance with newly developed investment management policy. [Goal 4]
- Successful transition of Executive Directors [Goal 4]
- As a result of working with Finance Committee and APTE Executive Director, the team developed, edited, reviewed, proposed and received BOD approval for budget for 2021 [Goal 1, 2, 3, 4]
- In consultation with AoE Executive Director, managed, monitored, and reviewed monthly financial reports [Goal 1, 2, 3, 4]

### **2. Outstanding Items for action in 2021:**

- Three-year external audit is due in 2021
- Prepare for CSM 2022 true up
- Review changes/revisions for 2021 approved budget, as indicated
- Finance Committee to meet quarterly

### **3. Resources or actions anticipated to require BOD approval in 2021:**

- Work with Executive Director to identify external auditing agency and seek Board approval

## ***Director of Professional Development Report***

**Chair/Lead:** Tamara Gravano

### **1. Completed Action Items in 2020:**

- In January 2020, we began working with New Faculty Development Workshop and Mid-Career Faculty Development Workshop speakers to develop final course agendas and schedules with plans to finalize teaching assignments before CSM. [Goal 1]
- Advertising for the workshops began at CSM 2020. [Goal 1]. We increased the number of New Faculty workshop attendees to 85 due to wait list, and Midcareer to 65 (both increased by 10 slots). The registration was at 63 for New Faculty and 3 for Mid-Career in March 2020.
- In March, we decided to postpone the Mid-Career Dev workshop to 2021 due to low number of current registrants.
- In May we decided to postpone New Faculty and Mid-Career dev workshop to July /Aug 2021 due Coronavirus, allowing registrants the option to refund or hold seat for next year. We had 25 people request to hold a seat for 2021 and refunded the three mid-career registrants.
- The Task force met to investigate new course offerings aimed at students and clinicians met and listed ideas and potential topics for Online courses [Goal 1]. Included ELC & CSM programming chairs, SIG chairs, PTA liaison, and ACAPT liaison to further refine offerings.

## **2. Outstanding Items for action in 2021:**

- Determine online feasibility of New Faculty and Mid-Career workshops. We likely will not be able to meet onsite in Chicago this summer. A meeting request is sent to the faculty of both courses and that of the Mini-GAMR faculty, who moved their content online this summer.

## **3. Resources or actions anticipated to require BOD approval in 2021:**

- None yet, but likely if we decide to go virtual with the workshops, we will need approval.

## ***Communications Representative-at-Large Report***

**Chair/Lead:** Karen Huhn

### **1. Completed Action Items in 2020:**

- Established regular meetings of the committee
- Increased social media activity-added LinkedIn and Instagram (Goal 1c)
- Surveyed membership to help determine what is needed/wanted (Goal 4 a, b, c)
- Added Educational Scholarship articles to newsletters (Goal 2b)

### **2. Outstanding Items for action in 2021:**

- Working on re-design of website-add resources, increase user friendliness (Goal 1c)
- Creating social media plan for 80<sup>th</sup> anniversary
- Create social media/newsletter content to drive members to website (Goal 4a)
- Creating educational resources for membership (Goal 4b, Goal 3c)
- Working with APTA membership to piggyback on their membership drive

### **3. Resources or actions anticipated to require BOD approval in 2021:**

- Potentially, minimal funding for Anniversary events
- Work force to create educational resources for website

## Special Interest Group (SIG) Reports

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### *Academic Faculty SIG Report*

**Chair/Lead:** Kimeran Evans

#### **1. Completed Action Items in 2020:**

- Worked with ATPE Vice President and Board to update AF SIG Rules of Order [**Academy Goal 4**]
- Concurrent round table discussion format continued from ELC 2019 at CSM 2020 with topics that included new faculty development, scholarship of education, and development of student professionalism. [**Academy Goals 1 and 3; AF SIG Objectives A-E**]
- AF SIG Leadership gathered resources for PT and PTA Educators during the COVID-19 pandemic and posted them on our AF SIG discussion board in August and then held round table discussions via Zoom breakout rooms at our AF SIG ELC 2020 virtual meeting. [**Academy Goals 1 and 3; AF SIG Objectives A, D and E**]. This met our 2<sup>nd</sup> outstanding goal from 2019 annual report (improving 2-way communication with AF SIG members).

#### **2. Outstanding Items for action in 2021:**

- For the first time, will join forces at CSM with other SIGs and ACAPT Consortia's (SIG Sortia) to offer increased educational and networking opportunities for our members. This year's educational topic is, "Using Educational Theory to pivot to online environment" featuring Sarah Gilliland, PT, DPT, PhD. This will be offered virtually during CSM 2021. [**Academy Goals 1 and 3; AF SIG Objectives A, B, D and E**].

#### **3. Resources or actions anticipated to require BOD approval in 2021:**

- None at this time.

### *Anatomy Educators SIG Report*

**Chair/Lead:** Ellen Costello

#### **1. SIG Updates:**

- Incoming Chair, stepped down shortly after beginning the new term of office
- Vice Chair, Ellen Costello assumed the duties of SIG Chair effective August, 2020
- Donna Skelly was unanimously voted by the SIG leadership to assume the role of Vice Chair for the remaining term

#### **2. Completed Action Items in 2020:**

- Anatomy presentation on clay modeling for the pelvic floor developed by Beth Moody Jones and Stephanie Muth presented at CSM 2020 [Goal 1]
- Continued Monitoring H.R. 1835 the Consensual Donation and Research Integrity Act of 2019, introduced in March where it was referred to two subcommittees. [Goal 3]
- Initiated Discussion Forums on the APTE website. Monitoring discussion forums and views. [Goal 4]

- ELC business meeting October 2020: 2 hour remote educational session with over 50 members in attendance. Topics included 1) Changes in course delivery during COVID; 2) Conducting Gross Lab F2F During Covid and 3) Invited speakers Drs. Melissa Carroll & James Karnes. [Goal 1]
- ELC educational session October 2020: Reasoning through Anatomy and Neuroscience: Progressing Recall to Relevance by Michael Jones, Matthew Paul Condo, Carrie A. Minahan, Don Reagan and Peter J. Rundquist.
- Modification and update of AESIG standing rules to include a Research Committee. The AESIG will offer a Research Grant in January, 2021. [Goal 2]

### 3. Outstanding Items for action in 2021:

- Continue to monitor H.R. 1835 the Consensual Donation and Research Integrity Act of 2019. [Goal 3]
- Continue to develop a more robust discussion forum on the APTE website. [Goal 4]
- Continue to explore development of core content in anatomy education [Goal 1]

### 4. Resources or actions anticipated to require BOD approval in 2021:

- None at present

## *Clinical Education SIG Report*

**Chair/Lead:** Carol Beckel (Academic Co-Chair) and Karen Bock (Clinical Co-Chair)

### 1. Completed Action Items in 2020:

- Initiation of Discussion Board topics around clinical education topics including impact of COVID-19 on clinical education
- Collaboration with NCCE and PTAESIG on a letter to clinical education community regarding impact of COVID-19 on clinical faculty, academic faculty, and students.
- Co-sponsorship with NCCE for two webinars titled “Collaborative Clinical Education Webinar”. Both webinars were fully enrolled (200 for June and 400 for July) with mix of academic and clinical faculty.
- Completion and acceptance of the Placement Process Task Force report, a joint endeavor with NCCE. The Boards of CESIG and NCCE prioritized the 9 recommendations.
- Selection of an academic and clinical representative from CESIG to the Liaison International CPI/CSIF Advisory Board with participation in the initial 2 meetings.
- Combined CESIG/NCCE presentation on Sunday of 2020 ELC programing was well attended
  - Subsequent requests for the information to be reformulated to preserve historical background of clinical education and for educational purposes in the future.
- CESIG Open Forum at 2020 ELC well attended with >100 members during the meeting
- Co-Chair participation in monthly Clinical Education Leadership meetings organized by Anne Reicheter with representatives from CESIG, PTAESIG, and NCCE.

### 2. Outstanding Items for action in 2021:

- Collaboration with NCCE and PTAESIG on the integration of the two drafts of clinical education terminology into a single document.

- Implementation of recommendations from the Placement Process Task Force in coordination with the NCCE.
- Dissemination of material presented during the 2020 ELC presentation prepared by CESIG/NCCE regarding clinical education.
- Collaboration with the APTA Academy of Education for the development of DCE and SCCE training programs.

### **3. Resources or actions anticipated to require BOD approval in 2021:**

- Support of specific actions on recommendations from Placement Process Task Force
- Support for the development of continuing education opportunities for DCE and SCCE

## ***Physical Therapist Assistant Educators SIG Report***

**Chair/Lead:** Jennifer Jewell

### **1. Completed Action Items in 2020:**

- Identified individuals to represent PTA education for the ELP reactor panel [Goal 1, 3]
- Participated in formation of the CPI Liaison Advisory Panel; designated one PTA clinical instructor and one academic member to serve on the panel [Goal 1, 3]
- Participated in meeting with NCCE, CE SIG leadership to develop uniform message to clinical education community during COVID-19 national crisis [Goal 1, 3]
- Developed PTA educator resource google doc for shared resources during COVID-19 national crisis [Goal 1, 3, 4]
- Initiated weekly webinar series to provide collaboration and networking among PTA and PT educators to increase understanding and facilitation of ideas during transition to remote online education due to COVID 19 pandemic [Goal 1, 3, 4]
- Participated as contributor on ACAPT document “Guidance on participation in clinical education experiences in physical therapy education” [Goal 1, 3]
- Identified candidate to represent PTA education on task force designing programming for transitioning into academia [Goal 1]
- Due to positive response to COVID response webinars, formalized webinar committee. Committee established and charged to formalize procedures and create mechanism for development of PTA educators as presenters at national level. Webinar series occurring monthly on the first Thursday of each month. Courses open to members and non-members) [Goal 1]
- Formulation of draft initiative (PTA Educators Networking/Teaching Communities) with goal of networking, mentorship and resource sharing [Goal 1,3,4]
- SIG Sponsored presentation completed at ELC regarding Open Educational Resources [Goal 1,2]
- Prepared report regarding PTA education and presented at the 2020 CAPTE central panel meeting and 2020 CAPTE open business meeting [Goal 1,2,3]
- PTA Education Survey Task Force- survey completed on impact of COVID-19 on PTA programs; the research report is accepted for presentation at CSM 2021 [Goal 1, 2, 3]

### **2. Outstanding Items for action in 2021:**

- Formalize membership details and launch PTA educators networking/teaching communities to provide ongoing mechanisms support among PTAE SIG members
- Provide assistance and support for the planning of the PTA Education Summit

### **3. Resources or actions anticipated to require BOD approval in 2021:**

- Possible need for administrative support for PTAE SIG communities

## ***Residency & Fellowship SIG Report***

**Chair/Lead:** Sara Kraft

### **1. Completed Action Items in 2020:**

- Completed 4 webinars for the membership collaborating with orthopedic section and ABPTRFE
- Ongoing mentor program for new residency faculty

### **2. Outstanding Items for action in 2021:**

- Ongoing research collaborative to bridge the gap between residency and residency specialty areas for broader research
- Think tank ongoing outreach for additional material
- Webinar to engage people in SIG interested in research collaborations

### **3. Resources or actions anticipated to require BOD approval in 2021:**

- No additional resources needed at this time.

## ***Scholarship of Education SIG Report***

**Chair/Lead:** Sarah Gilliland, PT, DPT, PhD

### **1. Completed Action Items in 2020:**

- Final book group discussion of Educating Physical Therapists held via Zoom on January 17. 20 participants attended. [2,4]
- Successful collaborative “SIG-Sortium” meeting at CSM (Feb15) working with the Clinical Reasoning and Education-Pedagogy Consortias of ACAPT. Over 30 attendees (for a 6:30am meeting!) Discussion incorporated understanding of the different group identities and how each group’s purpose can contribute to our improvement of education. Break out group discussions focused on concepts of excellence in teaching [goals 1-2]
- Initiated and conducted small group mentoring for new educational researchers in conjunction with the clinical reasoning and education/ pedagogy consortia building on the interest from the CSM 2020 SIG Sortia session [1,2]
  - Set up through BaseCamp (working with ACAPT consortia) to provide messaging, polling and small group connections
- SIG leadership meeting identified priorities for the year including: efforts to increase membership, identifying resources and ways to support novice educational researchers, and

exploring ways to build educational research based on the current examples of remote/ hybrid teaching [1,2,4]

- Held virtual membership meeting in conjunction with ELC [1,2,4]
  - Put out call for nominations for 2021 open positions
  - Focus of the meeting was on exploring educational research opportunities following pedagogical adaptations to remote teaching during COVID
  - Large group discussion on the variety of teaching adaptations
  - Small group discussions to explore potential research questions and methods to address identified questions
  - The small group format also worked to facilitate potential collaborations between members for engaging in research [2,4]
  - Members were encouraged to use the discussion forums on the Academy website to further discussions and build collaborations [4]
  
- Collaborations with the Education/ Pedagogy and Clinical Reasoning consortia as well as the Academic Faculty SIG for SIG-Sortia-2 at CSM 2021. [1,2,4]
  - Focus of this meeting will be on developing quality in research regarding pedagogical shifts during COVID.
  - Will include a brief presentation on teaching/ learning theories as relevant theoretical frameworks for pedagogical research
  - This session will be held on the CSM platform (date and time TBA)

## **2. Outstanding Items for action in 2021:**

- Zoom book/ article discussions were discontinued due to COVID Zoom fatigue/ burnout. We aim to resume bimonthly Zoom sessions (for book discussions, research discussions/ collaborations etc) in 2021 [2,4]

## **3. Resources or actions anticipated to require BOD approval in 2021:**

- None at this time

## **Committee Reports**

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### *Nominating Committee Chair Report*

**Chair/Lead:** April D. Newton

#### **1. Completed Action Items in 2020:**

- Collaborated with APTE BOD Nom Com members and APTE SIGs Nominating Committee Chairs to recruit candidates for open APTE BOD and SIG positions. [Goals 1, 3, 4]
- Assisted with review of candidate bios and statements for 2021 elections [Goals 1, 3, 4]

#### **2. Outstanding Items for action in 2021:**

- Coordinate Voting with Terry and Sherry (Begin no later than April 1<sup>st</sup> and open for four (4) weeks) [Goals 1, 3, 4]

- Determine voting time frame
- Tally ballots no later than seven (7) days following closing of the elections
- Verify results with APTE Secretary [Goals 1, 4]
- Report results to the APTE BOD, SIGs Nom Com Chairs, all candidates, and APTA

**3. Resources or actions anticipated to require BOD approval in 2021:** None

### *Volunteer Coordinator*

**Chair/Lead:** Angela Strickland, Volunteer Coordinator

**1. Completed Action Items in 2020:**

- Volunteer Positions filled in 2020
  - Combined Sections Meeting Co-Chair
  - Combined Sections Meeting Booth Volunteers
  - PTA Education Summit-- pending selection from Committee Chair

**2. Outstanding Items for action in 2021:**

- n/a

**3. Resources or actions anticipated to require BOD approval in 2021:**

- None anticipated at this time

### *CSM Program Committee Chair Report*

**Chair/Lead:** Becky McKnight & Scott Euype

**1. Completed Action Items in 2020:**

- Education sessions planned for CSM 2021 [Goal 1]
- Collaborated with APTA Events Services, Section Programming Chairs, Academy of Physical Therapy Education staff, and APTE Special Interest Group CSM Programming representatives and chairs to transition to virtual conference including pre/post- conference sessions, conference sessions and events (business meetings) [Goals 1 & 3]
- On boarding of new Section Programming Co-Chair

**2. Outstanding Items for action in 2021:**

- Continue to work with APTA Meeting Services to facilitate final planning and implementation of Virtual CSM 2021 [Goal 1]
- Formalize role of APTE Special Interest Group CSM Programming representatives [Goals 3 & 4]

**3. Resources or actions anticipated to require BOD approval in 2021:**

- None anticipated

## ***ELC Program Committee Chair Report***

**Chair/Lead:** Co-Chairs – Danille Parker & Cindy Utley

### **1. Completed Action Items in 2020:**

- ELC virtual conference, October 16 – 18, 2020. There were 35 live sessions (which were recorded), 16 on-Demand educational sessions, and 109 on-demand platform/poster sessions. All recorded sessions were available for review by registrants until November 19, 2020. There were 1,134 total registrations, which exceeded all prior years. [Goals 1,2,3]
- There were 17 exhibitors for ELC 2020. The Academy of Education and ACAPT promoted visits to the exhibit booths. There was a drawing for 4 complimentary ELC registrations for the attendees who visited all 17 exhibit booths.
- Planning for ELC 2021 is underway. It is scheduled for Atlanta. Here is a link to the ELC website. <https://educationalleadershipconference.org/events/annual-conference/2021/index.cfm> [Goals 1,2,3]
- ELC 2022 is scheduled for Milwaukee: <https://educationalleadershipconference.org/events/annual-conference/2022/index.cfm> [Goals 1,2,3]

### **2. Outstanding Items for action in 2021:**

- Policies and procedures on how to best utilize the recorded programming from ELC.
- Reviewing different platforms for ELC 2021 that will encompass all aspects from submission of abstracts to scheduling, registration, and better integration for attendees and speakers.

### **3. Resources or actions anticipated to require BOD approval in 2021:**

- None

## ***Awards Committee Chair Report***

**Chair/Lead:** Donni Welch-Rawls

### **1. Completed Action Items in 2020:**

- Implemented new Distinguished Educator in Physical Therapist Assistant Education Award [goal 1,3]
- Nominations and applications encouraged via: collaboration with the PTAE SIG; emails to leaders of post professional degree programs; contacts with faculty, committee leaders, etc. Also, ACAPT put the call for awards in their newsletter twice for the first time [ goal 1,3,4]
- Awards and scholarships decisions made at committee meeting December 9<sup>th</sup> [goal 1,2,3,4]
- Clarified that the Academy has 3 Adopt-a-Doc scholarships to award, with \$3,000. scholarship for each recipient. One recipient is sponsored by Cardon Rehab. [goal 1,2,4]
- Based on committee discussion and recommendations, minor revisions were suggested for the award rubric to improve clarity [goal 4]

### **2. Outstanding Items for action in 2021:**

- Evaluate awards committee document regarding expectations for the awards ceremony at CSM [goal 1,4]
- Assess need for specifying ratings for rubrics for #1-5 [goal 4]

### 3. Resources or actions anticipated to require BOD approval in 2021:

None

## *Research Committee Chair Report*

**Chair/Lead:** Michael Buck

### 1. Completed Action Items in 2020:

- Completed review of 241 abstracts submitted for poster/platform presentation CSM 2021. Reviews were completed by members of the Research Committee as well as others that responded to a call for assistance in the process. The Research Committee wishes to both recognize and thank this group of reviewers for their time and considered input on these abstract submissions. (Goal #2)
  - 28 accepted for platform presentations (1 subsequently withdrew)
  - 159 accepted for poster presentation
- Reviewed and approved “no-cost extensions” for two grant recipients from 19-20 cycle. These requests were directly related to unexpected delays and challenges to the investigations caused by the COVID pandemic. (Goal #2)
- Reviewed scored and ranked 6 strong and well written applications for Research Grant. Partial awards to support two of the 6 projects were offered and accepted. (Goal #2)
  - Richard Shields PT, PhD, FAPTA (PI) and colleagues for “Benchmarking Outcomes in Physical Therapist Education: The PT-GQ™ Survey.” \$17,000
  - Lorna Hayward, PT, EdD, MPH (PI) and colleagues for “Point of Care Ultrasound in Physical Therapy Practice, Uncovering Novice to Expert Professional Pathways to Inform an Evidence-Based Pedagogical Approach.”

### 2. Outstanding Items for action in 2021:

- Finalize paperwork for research grant award recipients and ensure funds are available.
- Anticipate receipt final reports from the funded research projects from 2020 cycle.

### 3. Resources or actions anticipated to require BOD approval in 2021:

- Continued support as previously provided to complete our charge.

## *Social Media Report*

**Chair/Lead:** Heather Mack and Kim Novak, Co-Chairs

### 1. Completed Action Items in 2020:

- Facebook:

- Increase in 70 page likes in 2020
- Peak increase in page likes during ELC time frame
- Most liked posts occurred on:
  - March 5: >24
  - May 8: >16
  - October 15: >22
- Spikes in Reach:
  - March >800
  - September >800
  - October >700
- Twitter:
  - New Followers: 347
  - Profile Visits: 1,438
  - Mentions: 418
  - Tweet Impressions (Likes): 49,517
  - Top tweet impressions occurred during the month of October (for a total of 26,800 out of the 49,517 of tweet impressions.)

**2. Outstanding Items for action in 2021:**

- Implementation of Hoot Suite for the APTA Academy of Education.
- Implementing use of Instagram for the APTA Academy of Education.
- Reinforcement of the approved APTA Academy of Education hashtag.

**3. Resources or actions anticipated to require BOD approval in 2021:**

- None

## JoPTE Report

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**Chair/Lead:** Susan Wainwright, Editor-in-Chief  
Joyce Maring, Associate Editor

### 1. Completed Action Items in 2020:

Integration of Managing Editor (Goals 1,4): The contract with KFW Editorial begun May 2021. We have received great support from Kelly Hadsell, Editorial Director as we transitioned from our initial editor to the current Managing Editor, Jake Bateman.

We have achieved the following in collaboration with KFW Editorial:

- Established workflow to expedite the submission and peer review process.
- Facilitate communication between authors, reviewers, editorial board members and the publisher.
- Streamlined processes in the Editorial Manager site.
- Updated the editorial board member database inclusive of contact information and topics of content expertise; the reviewer database continues in process.
- Completed selection of 2020 JOPTe Award winners.

In addition, KFW has contributed to and served as a resource to inform development/revision of procedures and pending Medline application. We appreciate the APTE Board's support of this critical administrative support.

Social Media (Goals 1,4): Under the leadership of Editorial Board Member Marisa Birkmeier, the visibility of the Journal has increased through presence on Facebook, Instagram and Twitter.

Accounts were established in March 2020. The activities have included:

1. Video vignettes by authors highlighting research
2. Communications highlighting papers published
3. Engagement with the broader international educational research community represented by followers on all three accounts from outside the physical therapy profession
4. Promotion of the hashtag #PTed to increase engagement and reach related to PT educational research
5. Participation with the APTE communications committee

Recent social media analytics from the past 28 days starting on Dec 23, 2020 include:

@JOPTeJournal Twitter:

- Followers – 181
- Tweet impressions – 9360 (up 1200%)
- Profile visits – 813 (up 2400%)

@JOPTeJournal Facebook:

- Page likes – 422
- Facebook reach – 1794 (up 4500%)

@JOPTeJournal Instagram:

- Followers – 126
- Instagram reach – 473 (up 11K%)

JOPTe 2020 Award Winners (Goals 2,3):

Congratulations 2020 Journal of Physical Therapy Education Award Winners

We are fortunate that two Education Section members have provided a mechanism through which we can recognize outstanding contributions to the literature each year. The Editorial Board of the *Journal*

of *Physical Therapy Education* takes great pleasure in selecting the awardees each year, while gratefully acknowledging these donors.

The **Stanford Award** was created by Katherine Shepard, PT, PhD, FAPTA in honor of her former faculty colleagues at Stanford University, to recognize the author(s) of a manuscript containing the most influential educational ideas published in the *Journal of Physical Therapy Education* for the calendar year. The Stanford Award for 2020 is given to:

*"Defining Global Health Competencies for Entry-Level Physical Therapist Education"* by Nnedinma Ubani, Celia Pechak, and Jill D. Black

The **Feitelberg Journal Founders' Award** was created by Samuel B. Feitelberg, PT, MA, FAPTA in honor of the efforts of the over 100 colleagues whose contributions of time and money created the *Journal of Physical Therapy Education*, to acknowledge excellence in publication by a first-time author in the *Journal of PT Education* for the calendar year. The Feitelberg Founders' Award for 2020 is given to:

*"Telehealth Physical Therapy as an Innovative Clinical Education Model with Positive Patient Impact: A Case Report in the Context of the COVID-19 Pandemic"* by Sarah M. Hong, Becky J. Olson-Kellogg, Sara E. North, Jackson L. Davis, and Justin L. Staker

Dashboard of JOPTe 2020 statistics for the year (Goal 1):

Report Item	Metric	Trend	Comparisons	Comments
# Manuscripts submitted	122	↑	2019: 103 2018: 110	Excluding editorials and Creasoli Lecture
Acceptance rate (%)	29%	↓	2019: 39% 2018: 44%	Excluding editorials and Creasoli Lecture
# Manuscripts published.	42	↑	2019: 39 2018: -----	Exclusive of editorials (4), letter to the editor (1), erratum (1).
Research Reports manuscripts published (%)	74%	↑	2019: >50% 2018: -----	Metric to highlight in the Medline application. (Goal 3)

## 2. Outstanding Items for action in 2021:

- Submit Medline application.
- Complete database review and update of manuscript reviewers.
- Ongoing implementation and refinement of Managing Editor roles and responsibilities.

## 3. Resources or actions anticipated to require BOD approval in 2021:

We will make the following requests for resources

1. We would like to purchase a Hootsuite subscription for \$29.00/month for 1 user or \$129/month Team subscription for 3 users. Hootsuite is a social media management system that organizes and integrates a variety of social media platforms including - Twitter, Facebook, Instagram, LinkedIn and YouTube. This justification for this subscription is to facilitate a more efficient and robust marketing and communication strategy to our membership.
2. Sustainability of these social media initiatives will be enhanced with additional support. We are requesting funding to support a JoPTE digital media intern position. An intern can create digital media content and schedule posts to allow the digital media editor to solicit and curate specific

themes and publications to highlight. This intern position will be ~4 hours per week. At \$15/hour, the total amount for the intern position will be ~\$3120 per year.