Evaluation of Social Interaction Skills (ESI)
North American Course Hosting Guidelines
(Registrations Administered by CIOTS)

The CIOTS team hopes you find these guidelines helpful and informative. This document is meant to give you a solid overview of our course hosting expectations. We strive to hold high quality and well-organized courses. Thank you for collaborating with us to deliver world class Occupational Therapy continuing education. If you have any questions, please do write or call us.

CIOTS Course Coordination
Courses@innovativeOTsolutions.com
+1 970 416 8612

Classroom Specifications

As you consider hosting a course, ensuring that the classroom meets our guidelines is critical. The classroom must have tables and comfortable chairs for the participants and faculty. Excellent, dimmable lighting, reliable high-speed internet connection for streaming video in the classroom, and superior audio-visual equipment is imperative. Planning in regard to a healthy mid-morning and mid-afternoon nutrition break, as well as providing information regarding the location of parking and restrooms are appreciated by everyone. Specific details are as follows:

Classroom lighting:

Ambient and overhead lighting must be controlled by the faculty and capable of being dimmed sufficiently during LCD projection to ensure both the quality of the video and the ability of participants to take notes.

Break snacks and drinks location:

In order to provide a quiet environment for participants when scoring cases, breaks and other related activities must occur outside of the classroom.   (See the ESI Course Handouts for full course schedule and break times).

Restrooms:

Restroom facilities need to be clean and readily available.

Parking (if applicable):

Adequate parking, including parking for those with disabilities, will need to be arranged. If needed, parking permits should be provided either before the course or on the first day at registration.
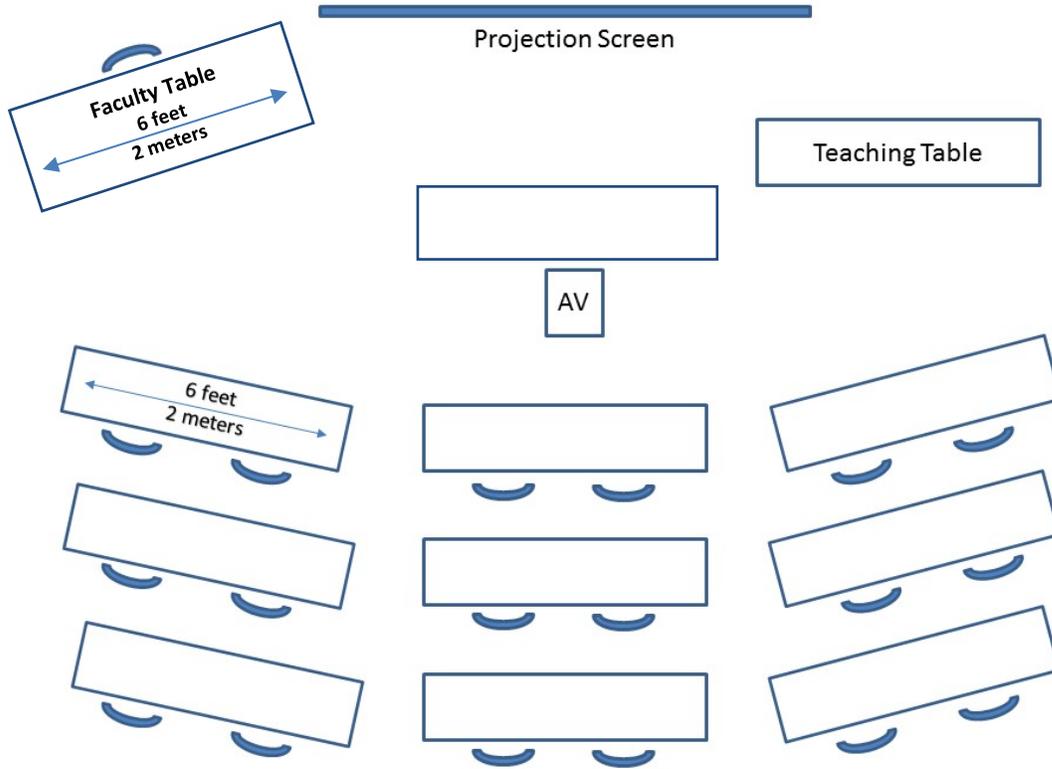
Internet connection:

Reliable high-speed internet connection for streaming video in the classroom is required. Ensure that faculty and the local course coordinator will have access to the internet in the classroom during the course.

Arrangement of room:

A private, quiet room large enough to seat the participants using tables and chairs is required. The participants must be seated at tables or similar surfaces large enough to hold open two large notebooks or binders and other pieces of paper. Recommended seating allowances are to allow one meter of table space per participant. The chairs must be comfortable and preferably moveable. Be sure there is enough space between rows so that the faculty may move about the room and speak with seated participants individually. Folding chairs or metal seats are not acceptable.

One large table (2 meters) and a chair for the faculty will need to be placed at the front of the room, facing the participants. The faculty cannot be sitting in front of the projection screen. In addition, a large table will be needed at the front, facing the participants for teaching and demonstrations. Another smaller table will be needed for audio visual equipment.

It is best if the room is square in shape. Long, narrow rooms are not acceptable as it is difficult to see the video projection. The best layout is to have the rows laid out at an angle, or as shown in the figure on the next page:

Projection Screen

Faculty Table
6 feet
2 meters

Teaching Table

AV

6 feet
2 meters

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Audio Visual Specifications

High quality audio visual equipment is a very important component of teaching a course. High quality LCD projection is vital. Plan to arrive approximately 1 hour early each day to arrange the room furniture, test all equipment, and to assist faculty with any technical needs they may have. Please contact each faculty to ensure you will have available correct connections for laptop computers, projection and sound system equipment.

Test all equipment for compatibility 1 week and the day prior to the course. You must ensure, before Day 1 of the course, that a sharp, clear, and bright image is projected from the LCD projector onto the screen. The lights must not be turned off when using the projector.

PLEASE TEST EQUIPMENT AND BE SURE IT WORKS EACH DAY.

Audio Visual Requirements
Bright LCD projector with system inputs and cables for a laptop computer. It must be controlled easily by the faculty from the front of the classroom.
Large screen for projection. The projected image needs to be large enough that those in the back of the room can see clearly the videos and slides as they are being projected. Additionally, the image on the screen must be projected high enough so that the participants in the back of the room can see the bottom of the slides over the heads of those seated front of them.
Sound: external speakers and microphone. The external speakers can be connected to the laptop via a *single pin input jack*, but the sound may not be loud enough to be heard from the back of the room. You may need amplified speakers loud enough for larger courses.
Extension cords and cables for all equipment.
A computer that includes the special characters, if needed, of any non-English language (e.g., å, æ, ü, ø) and internet connection. The computer needs to be located in an area where the participants have ready access and can enter their information before the course day starts or during breaks for our database course registration process and in order to get their software information.
Reliable high-speed internet in the classroom.
Check with each faculty to determine if a laptop needs to be provided for their use during the course. The laptop must be newer, able to work with LCD technology, have a modern version of Microsoft Office (PowerPoint, Word, Excel) and a USB port.

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On-site Support and Course Preparation

While the majority of the preparation is done before the course, we do require daily, limited, on-site support. Having someone who is not attending the course readily available to assist the faculty and manage the day-to-day needs of a course is vital.

Highlighters and name tags

Each participant will need a yellow highlighter and name tag. The person's first name should be written in large letters that are easy to read.

Live case

On the last day of ESI courses, participants will need to observe a "live" case social interaction. Preferably, the teaching faculty will be involved in the final selection of the "live" case. However, it will be important that you identify potential "live" case people who meet the criteria before the course begins.

- Two or three persons are needed to come in for about 30 minutes to engage in a social interaction in front of the participants. The live observation takes place after lunch on Day 3. The faculty who teaches the course will inform you of when and where the volunteers should come once the faculty has seen the course classroom.

  Typically, the faculty will not meet the volunteers who come before the live observation begins. Someone who is not a course participant, therefore, may need to be available to meet the volunteers when they arrive and inform them of when and how to enter the classroom. The final plan will be determined by the faculty teaching the course.

- The volunteers can be colleagues (well adults), even other occupational therapists. They cannot be a course participant, or someone who is trained in the ESI.

  Well adults actually work well, as it is much easier than bringing in persons who have social interaction difficulties who may not feel comfortable interacting in front of a large group of people.

- When appropriate, please give each person a thank you card, and a small gift or cash (about $20 USD).

Lunches and Breaks

The *ESI Course Handouts* contain a schedule which indicates the length of lunch breaks, 1 hour. These lunch breaks are designed to allow a participant to go and get lunch (40 minutes) and have time to complete items discussed in the previous course session (20 minutes). Please do not shorten the length of lunch breaks. Although food for lunches is not typically provided, you may decide to do so at your own expense. If you plan to provide or schedule a group lunch, please ensure that the total lunch time (including travel, if applicable) does not exceed 40 minutes.

The schedule contained in the *ESI Course Handouts* also indicates the length and timing of other short breaks (20 minutes each).

Arrange for a light, plentiful, and healthful snack to be served at each short break. Hot and cold beverages such as tea, coffee, juice, and carbonated drinks, as well as water should be available. The faculty is often busy working with course participants during break times and may not have the opportunity to take a break. Please be attentive to their needs.

The *ESI Course Handouts* may be found on the Center for Innovative OT Solutions website at https://www.innovativeotsolutions.com/resource/esi-course-materials/. Click **ESI course materials**. Download a zip file containing all handouts. The schedule may be found in the PDF file called "esiCourseHandouts".

Pre-course preparation by participants

CIOTS will send out an email to each participant approximately 4 weeks prior to the course start. This email will explain what documents should be printed and brought to the course on Day 1, as well as the reading that each participant should complete prior to the course. The participants' manuals will be shipped in bulk prior to Day 1 of the course.

Ordering and distributing manuals and software

About 30 days prior to the start of the course, CIOTS will notify the course host of the final participant count. At that time, we will order the shipment of the manuals required for the course.

We will need the following shipping information from you:
First and last name
Company or University name if applicable
Address, City, State/Province
Postal code and Country
Phone and e-mail contact for shipping purposes

The manuals will be shipped to the address you provide. The shipments normally take about **7 to 15 business days to arrive**.

Software licenses can only be distributed to those participants who attend a course. Participants will register with our system called the CORe on Day 1 of the course. They will then be sent their 3-year ESI OTAP software license and installation instructions to the email address they provide.

Teaching and demonstration materials

Materials and supplies will be needed by the faculty for teaching demonstration purposes. Each of these items will be needed on a daily basis.   When possible, keep these items in the classroom after each day so that they are readily available the following day. If they must be removed from the classroom, please have them available no later than 8:00 a.m.

Teaching materials (All 3 days)

Large white dry erase board and several fresh different colored dry erase markers.
If no dry erase board is available, a flip chart with several fresh different colored markers.

Supplies for the live case (Day 3)

a. Two decks of playing cards
b. Four or five magazines with colored pictures from which pictures or text can be
    cut out – a variety of topics suitable for men and women is desirable
c. Scissors (2 pair)
d. Marking pens (fine) – several different colors
e. Glue stick or glue
f. 5 to 10 sheets of white paper (letter or A4 size)
g. 3 or 4 sheets of colored paper (different colors, letter or A4 size)
h. Two pens
i. Two pencils (with erasers)

Advertising

We rely on our course hosts to advertise the course locally. We will list the course on our website with a link for registration. Please do invite local area OTs and student OTs to the course. A sample ESI flyer may be found on the last page of this document.

We are happy to provide high quality graphic logos, and you are encouraged to use the information from our website in your written materials to advertise the course.

ESI overview may be found on our website https://www.innovativeotsolutions.com/tools/esi/

ESI course objectives and rater calibration information may be found on our website https://www.innovativeotsolutions.com/esi-certification/

Recommended Course Planning Schedule and Checklist

The following is a recommended course planning schedule. It is intended to serve as a general guideline to facilitate your planning.

4 to 9+ months before the course begins

1. Schedule a course 4 to 9+ months in advance with CIOTS (Less time is needed for large university courses).
2. Determine a host site and reserve a room. (Be sure the room is available for the course schedule found in the *Course Handouts.* (The *ESI Course Handouts* may be found on the Center for Innovative OT Solutions website at https://www.innovativeotsolutions.com/resource/esi-course-materials/. Click **ESI course materials**. Download a zip file containing all handouts. The schedule may be found in the PDF file called "esiCourseHandouts".)
3. Begin to advertise.
4. You will need to provide CIOTS with the Course Location (including if possible a website link for the venue) and Shipping information. You may also want to provide website links and or information regarding parking, accommodations, driving directions, maps, and other visitor information. CIOTS will post the course on our website and online store.

3 to 4 months before the course begins

1. Continue advertising, if needed.
2. Plan for snacks and drinks for each break time (does **not** have to be expensive catering).
3. Reserve audio visual equipment.

30 days or more before the course begins

1. Contact live case participant(s) and plan for observation.
2. Final course participant count will be established 3-4 weeks before course begins and course manuals will be shipped to your site
3. CIOTS will introduce you to the faculty who will teach the course. Faculty may contact you for local hotel or transportation information.

15 to 30 days before the course begins

CIOTS will send participants an email with pre-course preparation information, including the required reading and handouts to be printed prior to the first day of the course.

One week prior to the first day of the course

1. Finalize the snacks and drinks schedule.
2. Check audio visual equipment arrangements.
3. Make final arrangements for teaching demonstration materials and supplies.
4. Create name tags and provide highlighter for each participant.
5. Double check that the room will be open and available for the course schedule found in the *Course Handouts.* (The *ESI Course Handouts* may be found on the Center for Innovative OT Solutions website at https://www.innovativeotsolutions.com/resource/esi-course-materials/. Click **ESI course materials**. Download a zip file containing all handouts. The schedule may be found in the PDF file called "esiCourseHandouts".)

During the week of each course

Software will be distributed to each participant via email using the information each participant provides Day 1 in the CORe (our online database).

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Sample ESI Training Workshop

January 5-9, 2019

Colorado State University, Department of OT
800 Oval Drive
Fort Collins, CO 80523

The **Evaluation of Social Interaction** (ESI) is an innovative observational assessment that is used to measure the *quality* of a person's social interaction during natural social exchanges with typical social partners.

The ESI is an ideal tool for occupational therapists who:

- Have clients 2½ years and above, including older adults.
- Are looking for a valid and reliable assessment of the quality of social interaction
- Need to demonstrate effectiveness of intervention.

Hours
Course hours are *Monday-Wednesday*: 8:00 a.m. – 6:00 p.m. Full attendance all three days is required.

Rater Calibration Requirements
Rater calibration requires that potential raters view and score videotaped ESI observations during the course and then complete 10 live observations after the course.

Costs
Registration fees: $795 USD OTs, $635 USD OT Students covers tuition, instruction materials including the ESI manual, a 3-year OTAP ESI software license key, and data analysis and feedback afterwards for calibration.

Registration
Register here: (LINK) Deadline is December 5, 2018 at 5:00 p.m.

More information about this course is available at:
https://www.innovativeotsolutions.com/courses/take-a-course/upcoming-courses/