

OT Canada Reflection Day Report from May 29, 2013

Thinking about Practice Proficiencies

Introduction

The 2013 *OT Canada* (OTC) Forum, which was held on the 29th May in Victoria (B.C.), took the shape of a reflection day entitled *Thinking about Practice Proficiencies*. Twenty-three representatives from the Association of Canadian University Programmes (ACOTUP), the Association of Canadian Occupational Therapy Regulatory Organisations (ACOTRO), the Canadian Association of Occupational Therapists (CAOT), the Professional Alliance of Canada (PAC) and the Canadian Occupational Therapy Foundation (COTF) participated, with Dr Brigitte Harris (Royal Roads University) engaged to facilitate the meeting. The OTC Forum was organized by a working group comprising six representatives from ACOTUP and ACOTRO (Andrew Freeman, Susan Rappolt, Gayle Salsman, Tal Jarus, Margo Paterson, and Donna Collins).

How the OTC Reflection Day theme was chosen

The topics of professional competencies, advanced practice, specialization, and practice proficiencies had been a focus of ACOTUP's attention for over a year. The members of the working group came together to discuss common concerns about entry level programs being accredited to teach broadly based competencies while the job market increasingly requires specific proficiencies. Working group members also identified that although there are norms to which all 14 Canadian entry-level programs must adhere, there is considerable variability across programs concerning the specific nature and levels of entry-level curriculum content. Provincial scopes of practice and regulations may account for some of these variations. Working group members recognized the implications of this variability for the broader *competency- proficiency-advanced practice-specialization* debates for occupational therapists. The content and level of entry-level occupational therapy education affects graduates' eligibility for national certification, regulation and mobility across provincial and territorial jurisdictions, roles in health care and other practice contexts, and the ability to compete with other professionals for jobs and funding. Concern about achieving consensus on the issues of competencies, proficiencies, advanced practice and specialization is therefore of interest not only to educators and practitioners, but also to regulators and the professional associations. As ACOTUP was responsible for hosting the annual leadership forum in 2013, the topic of practice proficiencies was suggested as the focus.

The working group, the membership of which evolved to include a representative of ACOTRO, felt that a national debate on competency and proficiency-level occupational therapy education, advanced practice and specialization was needed and should include the entire occupational therapy profession. The debate should consider not only the profession's knowledge base but also the social, political and economic contexts of its practices. From the working group's perspective, the two most prominent economic influences on occupational therapy practice have been the rationalization of publicly-funded services and the increase in profit seeking privatized services. In both cases, occupational therapists face pressure from employers and service funders for more cost-effective services. Competition within and across health and social service professions is fueled by funders who seek the best services for the best price. Recognizing that the scopes and repertoires of occupational therapists go beyond the capacities of other health and social services professions, occupational therapy educators strive to prepare occupational therapists for theoretically-driven, evidence-informed, client-centred practices to address individual and collective health and social issues. The working group therefore proposed a structure and format to engage representatives of Canada's occupational therapy leaders in discussion and debate on the appropriate focus, scope and level of entry level occupational therapy education in Canada.

How the day was organized

The Reflection Day was divided into two sections: first, to take the pulse of the national practice environment and subsequently to facilitate constructive debate toward strategies for action:

The Environmental Scan: Using a World Café model and working in groups composed of representatives from each of the five organisations, participants were asked to consider five questions. A preamble was provided for each question in order to minimize ambiguity, and a facilitator from the planning group documented participants' suggestions and comments on flip charts. The facilitator at each table posted and reviewed each groups' contributions with

subsequent groups arriving at the table to allow them to build on (or refute) previous contributions. At the end of the morning, each facilitator presented a summary of the five groups' responses to each question.

The five questions:

- **Fragmentation versus holism:** *How might occupational therapy practice proficiencies be adjusted for contemporary and future practices in light of how we now understand the relationship between occupation and the determinants of health?*
- **Is a common entry-level competency foundation sufficient for current occupational therapy practice?:** *What are the implications of "generic" competency based entry-level education of occupational therapists in Canada given the current and future markets for occupational therapy services?*
- **Regulatory variations and the negation of practice scope:** *What are the potential implications of different ways occupational therapy is regulated across the provinces?*
- **Advantage versus requirement for additional competencies:** *Is there a need for certification of specific fields within occupational therapy practice that could or even should be secured through official recognition? Should specific extra training should be considered a voluntary **advantage** over other occupational therapists or other professionals, versus a **requirement** for entry to a market for practice that is only available to those practitioners who have undertaken this training (specialization)?*
- **Who defines Canadian occupational therapy practice?** *How can the profession more actively shape the practice of occupational therapy in Canada?*

Strategies for action: During the first half of the afternoon, participants met with the other representatives from their own organization to suggest strategies. Each group's discussions were guided by the following prompts:

- *In light of the various issues discussed in the morning session, what are some suggestions you might have regarding how the occupational therapy profession in Canada should move forward with respect to how practice proficiencies are framed?*
- *In so doing, how will it take into account public protection, the maximisation of its contribution to the social good and effective competition for market share?*
- *Although we are asking you to consider these questions from your specific stakeholder perspective, we also want you to take into account the mandates of the other stakeholders.*

The second half of the afternoon included a facilitated discussion of the perspectives of each organization, and concluded with consideration of the next steps arising from the day's reflections.

Findings from the Environmental Scan

World Café facilitators found relatively little overlap between the five groups' contributions, perhaps because each group was provided with a summary of the contributions of previous groups, but also because each individual and group addressed different interests and held independent opinions. At the end of the morning, each facilitator summarized all responses to their question, acknowledging that these summaries were *off the cuff* and that a formal analysis of all the data would be undertaken.

Following the meeting, the contents of each of the facilitators' flip charts were transcribed verbatim and checked for accuracy by the recording facilitator. The facilitators added explanatory notes where the transcripts lacked detail and drafted summaries of the responses to their question. The corrected and annotated transcripts and facilitators' summaries were then read and coded independently by three of the facilitators.

The three coding facilitators met to review and analyze their findings, including both their understanding of the content responding to each question and their overall understanding of all participants' responses across the set of questions. They discussed their independently derived codes and themes as well as the relationships they saw between the codes and themes. These facilitators examined and debated the fit of the proposed themes across the data until they came to a consensus on the main findings of the environmental scan:

Collaboration:

Participants agreed that occupational therapy organizations need to come to a consensus regarding the environmental drivers affecting the prospects for the occupational therapy to address occupational needs. The profession's organizations also need to develop a common understanding of the top clinical and social priorities for occupational therapy services and research. Collaboratively, occupational therapy organizations need to advance knowledge about occupation and occupational therapy practices through their respective organization roles. Consensus is required within the profession to be able to communicate with one voice rather than with competing messages that decrease their impact. The profession's collective resources are limited and when communications are competing or conflicting, the profession's capacity to influence external audiences is less effective than it could be.

Power:

Participants reported that our professional organizations (ACOTUP, ACOTRO, CAOT, PAC, COTF) need to acknowledge the boundaries of our collective profession influence, and better define and respect the organizations' respective scopes of authority. Collectively and individually, our organizations need to assume and exert their rightful authority and assert and advocate for the public and our professional capacity to address public interests.

Competence and specialization in occupational therapy:

Occupational therapists must be educated as generalists, competent in enabling occupation and the six other generic roles as described in the 2012 *Profile of Occupational Therapy in Canada* (CAOT). Occupational therapists may, through their practices or post-entry training, *specialize* in wide-ranging generalist roles such as primary health care or rural and remote services. Occupational therapists may, through their practices or post-entry training, *specialize* in specific fields of practice, including, for example, neuro-cognitive rehabilitation, assistive technologies, psychotherapy, driving assessments, health care or social service management, and life care planning.

"Occupational Therapist First":

Occupational therapists should always present themselves as an occupational therapist first using their title, and then describe their scope, proficiencies, expertise and specialization. That is, occupational therapists should be encouraged to retain their title and use their title first in their listing of credentials, which would acknowledge that the lens they developed through their occupational therapy education and practices would continue to influence their professional roles, regardless of their focus and concentration. Occupational therapists should be encouraged to proudly speak about their roles and practices, however broad and far ranging. Occupational therapists should not be restricted, or be seen to be restricted, to describe occupational therapy practices as clinical practices.

Evidence of effectiveness and cost-effectiveness is necessary but not sufficient:

Occupational therapists, occupational scientists and occupational therapy organizations must invest in initiatives to build evidence of effectiveness and cost effectiveness of occupational therapy practices, and validate occupational therapy theories and models of practice. These stakeholders must translate the results of research for consumers, consumer organizations, funders and public policy audiences. Collectively, occupational therapists must advocate for their clients and the profession's capacity to address client needs strategically and collaboratively.

Defining and managing specialization within occupational therapy:

Occupational therapy organizations need to come to a common understanding of, and nomenclature for, specialization in occupational therapy, as well as definitions for advanced practice, generalist and specialist. These new understandings must incorporate a common way of regulating expertise and eligibility for designation as specialists in occupational therapy practices.

Findings from the afternoon discussion:

Following lunch, participants met with members of their own professional organization to process the content and their experiences of the morning's World Café. Subsequently, all participants participated in a broad ranging discussion on the topics of the day. Collectively, participants seemed to agree upon the following four points:

1. It is a significant challenge to maintain the holism central to the profession and prepare occupational therapists for increasingly specialized roles. Collectively, it was agreed that the job market is more difficult for new graduates due to competition from non-occupational therapists for traditional occupational therapy positions and roles, and constraints on public funding for occupational therapy and rehabilitation in general.
2. Regulatory organizations reported that if the profession chose to create specializations or advanced practice areas, it would respond by creating processes to support specialization. Regulators were impartial on the subject of specialization and would do whatever is needed to do to continue to protect the public interest.
3. Collectively, the participating organizations welcomed the idea of more collaborative discussions on professional issues that cross organizational mandates. There seemed to be a collective interest in moving beyond silos of authority and traditional positions on issues to achieve unifying goals, tools and policies.
4. All organizations agreed that the experiences of new graduates as they enter practice need to be tracked in a common database to learn about the sufficiency of their training for various practices and the job market in general in order to continually refine strategic plans.

Overall, four points continue to be challenges for the profession's collective future. These four points can guide our next steps:

1. Occupational therapy organizations need to collaboratively define concepts related to generalist and specialist practices and advanced practice.
2. How does the OT profession ensure it has control over how it is recognized and defined?
3. Should entry-level programs continue to focus on generalist education (basic competencies) or develop educational streams for specialization? To what extent does this question reflect the realities of rural versus urban practices?
4. Who will bear the costs of regulating specialization?

The day closed with an appreciation for what had been accomplished as well as the recognition that the profession, as a whole, must collaboratively address its challenges. Although the day began focused on competencies, proficiencies, advanced practice and specialization, the deliberations on these topics drove the discussion to a wider-ranging exchange regarding power within and external to the profession.

Respectfully submitted by

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