

Annual Report 2017-2018

Canadian Association of Occupational Therapists



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Executive message

In August, the Canadian Association of Occupational Therapists proudly announced a major milestone – 10,000 CAOT members. From all types of practice, from all corners of the country. We are so very proud of supporting this noble, caring profession and are truly focused on advancing its success. Thank you for adding your voice to strengthen our mandate.

Building a stronger association nurtures a sense of community, in turn unifying our profession to address the challenges that Canada's health care sector presents. And there are many. At CAOT Conference 2018 in Vancouver, 700 delegates convened to tackle a wide range of these pressing issues and put forward thoughtful, progressive solutions that only occupational therapy can deliver. It was our largest-ever program with 366 presentations, which provides a lot of knowledge and inspiration to embed into everyday practice and underscores what we already know: occupational therapy deserves to be valued and accessible to all Canadians.

The presenters at conference, those who participate on committees, serve on the Board, write an article, answer a survey, develop exam questions, review a product, submit an award nomination are all valued; CAOT couldn't operate without the contribution of our hundreds of volunteers and we are thankful every day that there are many as passionate about the profession as we are.



Nicola MacNaughton
CAOT President



Suzanne Maurice, CAOT
Interim Executive Director

And regarding passion, CAOT saluted Executive Director Janet Craik for the 11 years of dedicated service she provided to the association and gave our best wishes to Janet and husband Neil as they set off for a taste of overseas life and travel.

Thank you to all who have played a role in our growth and achievement. As CAOT moves into a new round of strategic planning this fall, we are armed with an understanding of what members want and are confident that, as your career partner, we will deliver.

Who we are and what we do



Serving the profession since 1926, CAOT is the professional organization that gives voice to the more than 17,000 occupational therapists (OTs) who work and study in Canada. CAOT members improve the health and well-being of Canadians by creating solutions that help them participate more fully in activities that are important to their everyday lives. With our national office located in Ottawa and regional chapters in British Columbia, Quebec and the North, CAOT works on behalf of its members to:

- Foster a sense of community that encourages pride in, and strengthening of, the occupational therapy profession through networking, innovation, knowledge exchange, and volunteer engagement.
- Improve access to, and utilization of, occupational therapy by advocating to government and health care decision-makers for better recognition of the contribution occupational therapy makes to the health and well-being of Canadians.
- Advance and enhance best practices with professional development and practice resources that are current, relevant, and affordable.
- Steward and safeguard the profession by accrediting occupational therapy programs in Canada and administering the National Occupational Therapy Certification Exam (NOTCE).

Mission

Advance excellence in occupational therapy.

Vision

Occupational therapy is valued and accessible across Canada.

Values

Integrity, Accountability, Respect, Equity, Innovation, Transparency, Diversity, Collaboration.

Strategic Priorities 2016-2019

1. Support occupational therapists in the evolution of their practice and the pursuit of excellence.
2. Advance awareness, understanding, and use of occupational therapy.
3. Position CAOT as the knowledge and resource hub for occupational therapy practice in Canada.
4. Foster a vibrant and sustainable CAOT.

Fostering a community of members



CAOT is, first and last, a member-based organization that invites input from all corners of the profession to guide our direction and set our priorities. CAOT is pleased to celebrate the support of more than 10,000 members, as together we make our profession stronger.

In 2017-18:

CAOT initiated some 'firsts' including our first:

- CAOT Member Townhall, over breakfast at CAOT Conference 2018, gathered candid input from participants in response to three questions:
 - Tell us about challenges in your OT work where there may be a role for CAOT to play.
 - How can we add value to your CAOT membership?
 - What are areas of improvement for CAOT?
- Member Appreciation Week, February 5 to 9, when we said 'thank you' to our valued members with a new special event each day,
- Facebook Live video filmed at CAOT Conference 2018 and shared with an online audience,
- CAOT Volunteer Program - *Get Involved!* was launched to better recruit and recognize the more than 300 member volunteers that help CAOT operate.
- *"CAOT Guide for New Grads"* to publish all the information needed to make the transition from study to practice with ease.

CAOT responded to member input by:

- Working through over 125 member suggestions submitted to the Great Ideas Portfolio, organizing, discussing and formulating next steps which often included 'just do it'.
- Announcing that CAOT-North would launch Oct 1 2018, to better connect and represent OTs living and working in our three territories and that Wade Scoffin, a recognized leader in the Yukon, would be its first Managing Director.
- Significantly reducing the annual membership fee for Retired Members from \$145 to \$35, with the aim to keep retired OTs involved in their profession.
- Reactivating our CAOT Instagram account, caotace, to further engage with our occupational therapy community where and how they want.
- Calling lapsed members to make sure they didn't miss out on all that CAOT membership has to offer and successfully reactivating 37% versus a target of 20%.
- Participating in and supporting the Occupational Therapist Assistant (OTA) Visioning Project, a forward-looking discussion with partners the Canadian Physiotherapy Association (CPA) and Physiotherapy Education Accreditation Canada (PEAC) that generated over 600 pages of responses.
- Updating the term "Support Personnel" to "Occupational Therapist Assistant" in the foundational reference *"Practice Profile for Occupational Therapist Assistants (2018)"*.

Advocating for change



CAOT participates in advocacy initiatives with the aim to advance inclusion of occupational therapy as an essential, supported service in Canada's health care system. To position our profession for success, we align our efforts with stated government priorities and promote the value of occupational therapy to federal and provincial decision-makers and influencers. We amplify the reach of our key messages through building connections and relationships, entering into relevant partnerships and contributing to coalition work.

In 2017-18:

- CAOT briefed the federal Standing Committee on Human Resources, Skills and Social Development and the Status of Persons with Disabilities (HUMA) providing rationale for allocating home care dollars to integrate OTs onto care teams in support of "Aging in Place" objectives. Our input was reflected in the report "*Advancing Inclusion and Quality of Life for Canadian Seniors*." We were subsequently pleased to see a federal Minister for Seniors post established and have now reached out and met with the office of Filomena Tassi, expressing support for a pan-Canadian Seniors' Strategy.
- Aligned with Aging in Place, but under a broader theme of accessibility, CAOT was asked to sit on the Home Modification Council of the Canadian Home Builders Association, acknowledging the evolving role OTs will play in collaborating on design/build/modify decisions for Canada's built environment.
- The "Ask for OT" campaign was launched in Vancouver, asking delegates to pledge to ask their own employer for coverage of occupational therapy services in their employee benefit plans. Over 100 pledges were taken.
- CAOT advanced on Truth and Reconciliation Commission directives during two focused events held at CAOT Conference that identified and articulated actions needed by the occupational therapy community:
 - Occupational Therapy Canada (OTC) Reflection Day 2018 workshop - Disrupting 'business as usual': Enhancing the provision of culturally safe occupational therapy with Indigenous communities, families, and individuals through organizational leadership, and
 - Professional Issue Forum - Inspiring actions: Occupational therapy paths to truth & reconciliation with Indigenous peoples.



Advocating for change



- Through continued work with the Coalition for Safe and Effective Pain Management (CSEPM) to address the opioid crisis, CAOT has been able to better position occupational therapy interventions as effective means of pain management that promote non-pharmacologic and preventive approaches to which OTs are uniquely skilled to deliver.
- CAOT connected with over 3,000 Canadian physicians at the Family Medicine Forum with a presentation related to older driver safety and with outreach materials advocating for inclusion of OTs on primary care teams, using a “Put an OT on your team – the right team, the right care” message.

- Through continued partnership with the Quality End-of-Life Care Coalition of Canada (QELCCC), CAOT contributed to legislation, “*A Framework on Palliative Care Canada Act*” which was enacted into law in December 2017, and participated in consultations on a Palliative Approach to Care Framework with Health Canada, emphasizing the need to include OTs on inter-professional primary care teams aimed at supporting a ‘good death.’
- CAOT-BC was front and centre in the BC government’s February announcement of a doubling of medical benefits related to car accidents and further extension of occupational therapy coverage to injured BC drivers.
- Public awareness was advanced as CAOT-Qc collaborated with retail pharmacy chain Proxim in delivering over 20 “Healthy Days” in-store events to educate older adults regarding home safety and fall prevention, with program learnings then presented at the Canadian Fall Prevention conference in St. John’s.



Advancing excellence



Supporting a satisfying and rewarding occupational therapy career is the core of the CAOT member value proposition.

In 2017-18:

CAOT delivered learning and networking opportunities such as:

- Co-hosting the Canadian National Driver Rehabilitation Conference in October, with the Association of Driver Rehabilitation Specialists (ADED).
- Providing the largest-ever Professional Development calendar of events
- Convening the profession in Vancouver, at CAOT Conference 2018, inspiring 700 delegates with a diverse, quality program featuring a record 366 presentations.
- Hosting open houses for nine Occupational Therapy Networks.

CAOT developed and introduced relevant, timely practice resources including:

- Two revised CAOT Position Statements: *“End-of-Life Care”* and *“Indigenous Health,”* which have been approved by the Board.
- Two new publications, launched:
 - *“Acting Ethically? A theoretical framework and method designed to overcome ethical tensions in occupational therapy practice.”* Author Marie-Josée Drolet, and
 - *“Recovery Education Program: For Inpatient Mental Health Providers.”* Authors Shu-Ping Chen and Terry Krupa.

- A series of role papers to describe the unique areas of competency of OTs within the Canadian health care system. The first one is *“Occupational Therapists Addressing Suicide.”*

CAOT celebrated progress for the profession as:

- The CJOT impact factor increased for a sixth year. This indication of journal excellence increased to 1.327 from 1.255, with total citations exceeding 1,000.
- Almost 3,000 CAOT members are now listed in the FIND an OT directory, ensuring they are reachable by Canadians.
- A new model of annual giving was unveiled with the Canadian Occupational Therapy Foundation, to fund and support the pursuit of vital occupational therapy research.
- More than 12 products were awarded a CAOT Seal of Recognition, an indication of quality determined by OT product reviewers who aim to help fellow OTs make informed referral choices.

CAOT introduced new program initiatives:

- CAOT Mentorship on Demand was launched to help mentees navigate their career development by being matched with a mentor.
- As part of our new partnership with the Canadian Home Builders Association, a member survey helped us compile a comprehensive list of existing resources and priority areas to further prepare OTs for an integral role in home modifications.

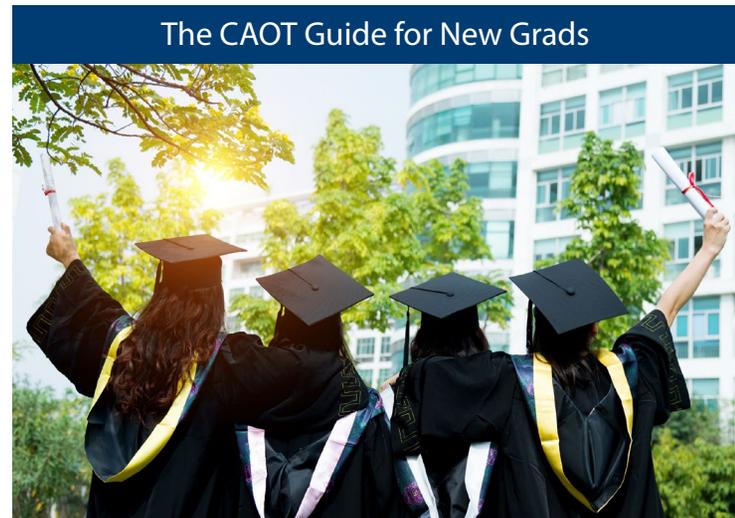
Safeguarding the profession



CAOT ensures that occupational therapy students receive a quality education that positions them for career success. CAOT and its committees lead and participate in the accreditation of OT and OTA programs that audit national standards, administer the National Occupational Therapy Certification Examination (NOTCE) and now collaborate on an initiative, CORECOM, to establish a single competency document for occupational therapy practice.

In 2017-18:

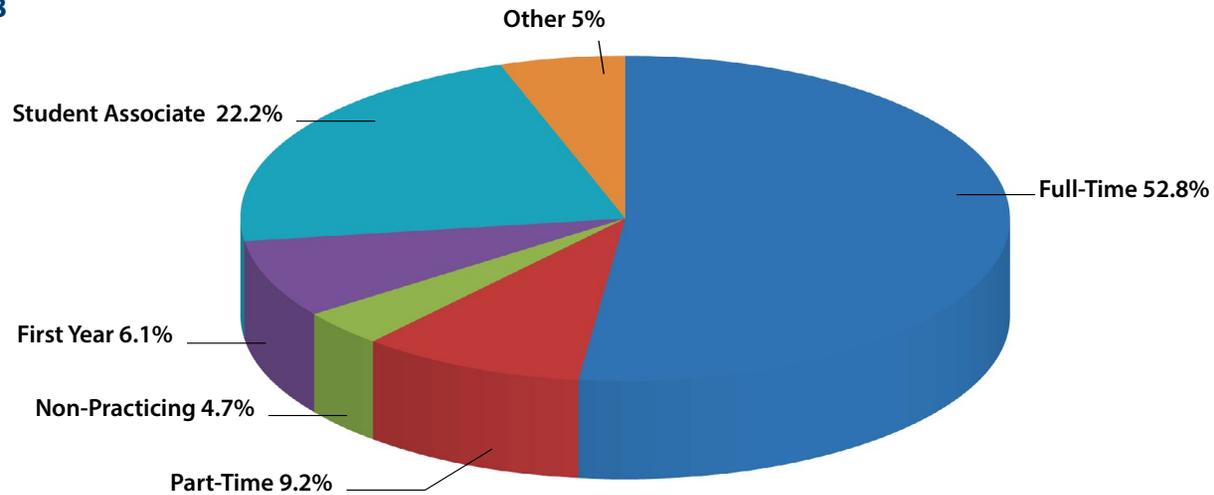
- “Collaboration on Inclusive Education” was the topic of a Professional Issue Forum held at CAOT Conference, with a panel of experts identifying and recommending ways to promote inclusive education and practice in Canada.
 - Exam agreements were signed with provincial regulators, setting out responsibilities and expectations for tasks such as determining candidacy, submission of reports, and oversight of policies and procedures. A new Exam Oversight Committee comprised of all provincial regulators met twice in 2018 and is working with the Certification Examination Committee and CAOT Board of Directors on best practice exam policies and procedures.
 - Exam results moved to electronic dissemination as of the July exam, allowing faster distribution of results and same-day delivery to all candidates. New exam resources were released and rebranded with more self-explanatory titles.
- Accreditation teams adopted a best-practice structure, moving to a single team conducting on-and off-site reviews, with a ‘reader’ position appointed to fill in under extenuating circumstances.
 - The Occupational Therapist Assistant and Physiotherapist Assistant Education Accreditation Program (OTA & PTA EAP) is undergoing a full strategic planning process in consultation with OTA educators, OT educators, and the related governing bodies.



Outcomes



Membership 2017 - 2018



Social Media

Type	2016	2017	2018
 Facebook page likes	6421	7008	8341
 Twitter followers	5307	6596	7504
 LinkedIn followers	5372	5722	6323
 Instagram (NEW!)			205
CAOT-BC blog followers	1208	1378	
CAOT-BC Twitter followers	1879	2495	
CAOT-Qc Facebook page likes	402	694	944

Awards

Excellence in the profession of occupational therapy was recognized at the awards ceremony at CAOT Conference 2018 in Vancouver, British Columbia.

Muriel Driver	Susan Forwell
Life Membership	Patricia Rigby
Life Membership	Ann Bossers
Life Membership	Jane McPhee
Fellowship	Lori Cyr
Fellowship	Tal Jarus
Leadership	Heidi Cramm
Award of Merit	Isabella Cheng
Innovative Practice	Mary Forhan
CAOT-BC	Stephen Epp
CAOT-QC	Marie-Josée Tessier
Golden Quill	Wendy Wood
	Jenna L. Lampe
	Christina A. Logan
	Amy R. Metcalfe
	Beth E. Hoesly



Financial report

(Year ending September 30, 2018)



Revenue

Membership	\$1,885,744	39.5%
Accreditation & Exam	\$594,659	12.5%
Publications	\$554,430	11.6%
CAOT & driving conferences	\$548,806	11.5%
Insurance premiums earned	\$490,882	10.3%
Professional Development	\$490,529	10.3%
Membership Services	\$79,053	1.7%
Product Recognition	\$31,355	0.7%
Investment income	\$25,612	0.5%
Other	\$19,649	0.4%
Rental income	\$48,447	1.0%
Total Revenue 2017-2018	\$4,769,167	100%
Budget 2017-2018	\$4,751,544	
Total Revenue 2016-2017	\$ 4,574,816	
Net Revenue 2017-2018	\$22,547	

Expenses

National office operations	\$1,415,466	30%
Publication expenses	\$643,534	14%
Membership Services	\$620,664	13%
Professional Development	\$408,376	9%
CAOT & driving conferences	\$359,909	8%
Accreditation & exam	\$329,217	7%
Insurance commission paid	\$305,226	6%
Governance	\$129,314	3%
Special projects	\$120,201	3%
Product Recognition	\$74,707	2%
Insurance claim expenses	\$78,199	2%
COTF grant	\$100,000	2%
Insurance administration	\$75,999	2%
Business development	\$42,232	1%
National divisions	\$24,446	1%
Representation/communications	\$19,129	0%
Total Expenses 2017-2018	\$4,746,620	100%
Budget 2017-2018	\$4,885,082	
Total Expenses 2016-2017	\$4,698,858	

Net Assets, Beginning of Year	\$2,365,002
Net Assets, End of Year	\$2,387,549

This information is intended as a brief summary of CAOT finances. CAOT members may request a copy of the audited financial statements by contacting national office at (800) 434-2268 ext. 248 or by emailing finance@caot.ca. The report will be presented at CAOT's Annual General Meeting on March 25, 2019, 12:00pm to 1:00 pm eastern time. For information, please visit www.caot.ca/aggm

Acknowledgements

Thank you to the many volunteers who contribute their hours and expertise in support of the aims of the Canadian Association of Occupational Therapists. Your tireless work, often behind the scenes, and your passion for the profession, are what make this association truly strong, purposeful and human.

CAOT board of directors

(On September 30, 2018)

Nicola MacNaughton
President

Christine Fleming
Interim Vice-chair

Sarah Burt
Interim Secretary

Jutta Hinrichs
Treasurer

Les Smith
British Columbia

Shaniff Esmail
Alberta

Christine Fleming
Saskatchewan

Lisa Diamond-Burchuk
Manitoba

Phillip Wendt
Ontario

Martine Brousseau
Quebec

Claudia Martin
New Brunswick

Terry McLaughlin
Nova Scotia

Marilee Miller
Prince Edward Island

Sarah Burt
Newfoundland and Labrador

Cathy McNeil
Territories

Elliot PausJensen
External Director

Andrew Freeman
World Federation of
Occupational Therapists

CAOT committee chairs

(On September 30, 2018)

Executive Committee
Nicola MacNaughton

Governance Committee
Sarah Burt

Finance, Audit and Risk Committee
Jutta Hinrichs

Awards, Appeals, Complaints
Christine Fleming

Academic Credentialing Council
Nadine Larivière

Certification Examination Committee
Joan Versnel

Conference Scientific Program Committee
Ben Mortenson

OT Now Editorial Board, **Flora To-Miles**

CJOT Editorial Board, **Helene Polatajko**

CAOT-BC Advisory Committee
Laura Bulk

CAOT-Qc Advisory Committee
Martine Brousseau

CAOT staff (On September 30, 2018)



Havelin Anand
Director of Government Affairs
and Policy

Candice Baetz
Policy Analyst

Chantel Bracken
Professional Development
Administrator

Sarah Charles
CAOT-BC Service Coordinator

Stephanie Clancy
Temp. Professional Development
Administrator

Michelle de la Salle
Customer Service Representative –
Membership Services

Christine Dettwiler
Membership Services Coordinator

Alison Douglas
Director of Standards

Chantal Houde
Communications Coordinator

Tracy Jolliffe
Business Development
Administrator

Tracy Kelso
Membership Services Manager

Vicky Lafortune
Business Administrator- Finance

Christina Lamontagne
Professional Development
Manager

Julie Lapointe
Director of Knowledge
Translation Programs

Zoey Lin
Business Administrator - Finance

Suzanne Maurice
Director of Administration

Ryan McGovern
Exam Services and Accreditation
Coordinator

Clare Pama
Interim Director of Finance

Stéphane Rochon
Customer Service Representative –
Business Development

Andrea Santos
Executive Assistant

Wade Scoffin
CAOT-North Managing Director

Lisa Sheehan
Conference & Events Manager

Randy St. Louis
Business Development &
Marketing Manager

Danielle Stevens
Graphic Design & Production
Manager

Flora To-Miles
Managing Editor - *OT Now*

Pat Underwood
Director of Communications

France Verville
CAOT-Qc Managing Director



Tim Packer. *A Walk In The Woods*. Oil on Canvas, 48in x 72in