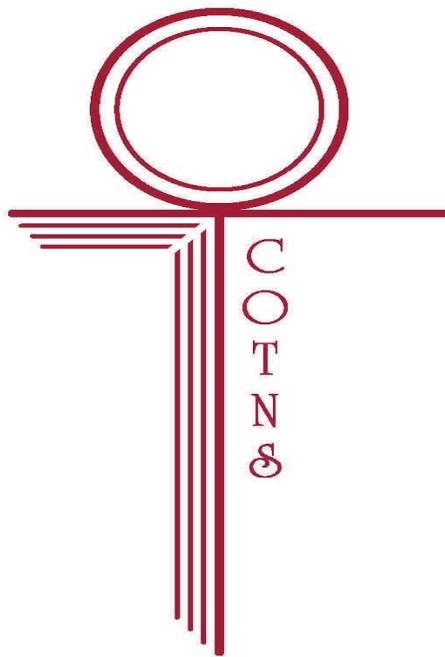


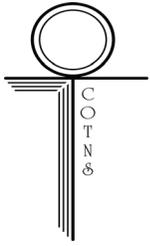
College of Occupational Therapists of Nova Scotia

# ANNUAL REPORT



# 2008

April 1, 2007 to March 31, 2008



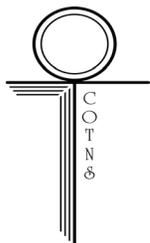
## College of Occupational Therapists of Nova

### **MISSION**

The College of Occupational Therapists of Nova Scotia regulates the provincial practice of occupational therapy by ensuring safe and ethical service in order to protect the public interest.

### **VISION**

The College of Occupational Therapists of Nova Scotia strives to effectively regulate the practice of occupational therapy and values continuous quality improvement.

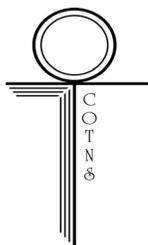


## College of Occupational Therapists of Nova

### VALUES

The College of Occupational Therapists of Nova Scotia is committed to demonstrating:

- Fairness and equity in business interactions with the public and with the registrants
- Accountability for decisions and actions
- Respect for both public and professional perspectives
- An open honest communication process
- Accessibility to services provided
- Efficiency of business practice

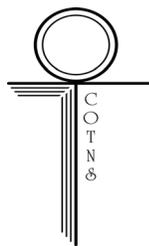


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The Board of Directors of the College of Occupational Therapists of Nova Scotia (COTNS) is pleased to announce that the **2008 Annual General Meeting (AGM)** will be held as follows:

**DATE:** Saturday, June 21st, 2008  
**LOCATION:** IWK HEALTH CENTRE  
5850/5890 University Avenue, Halifax, NS



## Joint Message from the Chair and the Registrar

We are pleased to present the College's annual report for 2007/2008 and to highlight our activities of the past year.

### **Key Strategic Area – Be Fiscally Responsible**

The Board of the College views this area as a critical component for the long term success of the College. The board conducted a thorough review of its finances including long term budget forecasting, review of the College's human resource needs, a technical needs assessment, review of College investments and an environmental scan to determine areas which will require additional financial resources.

At this time, the College finances are in good shape. The College continues to carry a balanced budget and each year for the past 5 years, we have been under budget. This has allowed the College to build some internally restricted funds to address disciplinary needs, the development of the Continuing Competence program and a special projects fund to address specific, time limited projects related to the board strategic plan and the College business plan.

Key areas for development related to this area include:

1. The College has identified that the work demands far exceed its current human resources. In order to best determine the human resource composition required for the College, the board will be partnering with the School of Management Studies to build a long term human resource plan which will include a review of the College's operational structure, a review of the College's employment policies, a review of salaries and benefits and the College's succession needs.
2. Further development of policies around the College's use of technology including the use of e-mail and web and teleconferencing.

### **Key Strategic Area – Work with other Organizations**

Building and maintaining collaborative partnerships is important for ensuring that the College is working efficiently, effectively, in a context which is current and utilizes the best practices. Some of the important organizations and specific actions are as follows:

1. The Association of Canadian Occupational Therapy Regulatory Organizations (ACOTRO). ACOTRO continues its work on a number of issues of mutual interest. An important activity included the project *Assessing the Competence of Internationally Educated Occupational Therapists for Practise in Canada: Towards a common approach and an assessment toolkit* co-funded by the British Columbia Ministry of Economic Development, Saskatchewan Ministry of Advanced Education and Employment Immigration Branch, Manitoba Immigrant Integration Program, ACOTRO, and the College of Occupational Therapists of British Columbia (COTBC).

ACOTRO functions through the strong leadership and dedication of its volunteer members. COTNS wishes to express its gratitude to all the Occupational Therapy Regulatory Organizations for the many hours of service of its representatives. In particular, COTNS would like to thank COTBC for supporting Kathy Corbett's dedication to the ACOTRO chair position, the College of Occupational Therapists of Manitoba for supporting Sharon Eadie in the vice-chair position and the College of Occupational Therapists of Ontario for handling much of the administrative duties. The Board of COTNS sincerely appreciates this support.

2. Nova Scotia Health Professions Regulatory Network

This network was established in 2006 as a forum for all the health professions regulatory bodies in Nova Scotia to discuss and address common regulatory issues. The Department of Health is also a member of this network. Legislative recommendations may be among the outcomes of this group's discussions.



## Joint Message from the Chair and the Registrar (cont'd)

Significant issues and accomplishments this year included the development of a joint position statement and references on Interprofessional Collaborative Practice; consultation on health human resource planning and pandemic planning and joint action around proposed Fair Access legislation.

### 3. Canadian Institute for Health Information (CIHI)

The College developed and implemented a new registrant database to improve the information which the College can provide to the National Occupational Therapy Database. The inaugural national report of the occupational therapy workforce was published in November 2007.

#### ***Key Strategic Area – Continuing Registrant Competence***

Providing members with programs and resources to maintain, enhance and monitor their competence is a key strategic area for the College. Key highlights in this area: distribution of the COTNS Continuing Competency Program Portfolio in July 2007, development of the Self – Assessment and Professional Development Plan documents and the development of a work plan around the College's Code of Ethics.

#### ***Key Strategic Area – Fair, Timely and Transparent Registration and Complaints Processes***

The College has completed a review of its existing policies and procedures around registration with the assistance of College legal counsel, Michael O'Hara. The result of this review was the creation of the Credentials Committee including terms of reference. This is an important Committee for the College, as it will be responsible for the development and implementation of all policies and procedures relating to registration. As well, this Committee will be responsible for making decisions around registration on an individual basis while applying the College registration criteria. This will then allow the College Board to act as an internal appeal process on decisions related to registration.

This Committee will become an important part of the College's operational plan for the upcoming year in light of government proposed legislation: *Fair Access to Regulated Professions Act*.

#### ***Key Strategic Area – Member Engagement/Volunteer Management***

The launch of the Continuing Competency Program Portfolio presented an opportunity to meet with members around the province. Education Sessions were conducted in Halifax (4), Amherst (for a meeting of the Northern Region), Kentville, Yarmouth and Bridgewater. A further education session is scheduled for Sydney. In addition to providing members with information relating to the Continuing Competence program, it has also provided the opportunity to discuss other College initiatives with members and to gather valuable information regarding issues affecting the practice of occupational therapists throughout the province.

In response, the College will strive to address these practice issues in the context of our work.

An area of ongoing concern for the College is the difficulty in recruiting qualified and motivated volunteers for our Committees. It is only through the dedication of volunteers that we will be able to accomplish our goals. The College is committed to the development of a Member Involvement Strategy to address this concern.

In closing, we would like to thank the members of the College Board and Committees – your leadership and dedication are the reason that we are proud of how much we have accomplished over the past year. We also would like to thank the College staff – Joy Moulton, office manager and Dorothy Edem, Continuing Competency Coordinator for the time, energy and talent which they bring to their work at the College.

The next few years will be critical in determining the ability of the College to be a leader in health regulation in Nova Scotia. We have built a solid foundation, however, we require the ongoing support of our membership to build on that foundation. We look forward to meeting the challenges which lie ahead.



## Registration Activities

With the assistance of our legal counsel, the College has done a review of the legislation related to how registrations are processed. This has resulted in the recommendation that a Credentials Committee be established. The mandate of this Committee will be to review individual applications for licensure; to review and revise the policies and procedures related to the College registration processes to ensure they are consistent, transparent and fair for all applicants and to report to the Board and the membership on an annual basis. This will allow the Board to serve as an independent internal review should the need arise. New government proposed legislation: *Fair Access to Regulated Professions Act* will have a tremendous impact on College registration policies. This legislation will require the College to develop, review and revise all policies and procedures related to registration processes over the next year.

Terms of References for the Credentials Committee have been approved by the Board and are available online. Anyone interested in serving on this Committee should contact the College office.

The table below outlines the trends related to registration over the past 5 years.

### Profile of Registrants:

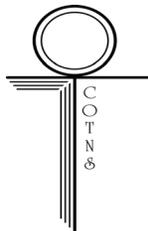
	<u>2008</u>	<u>2007</u>	<u>2006</u>	<u>2005</u>	<u>2004</u>
Number of Full Registrants	365	352	312	289	274
Surrendered Registration	21	14	19	17	11
Total Number of Applicants	34	50	30	23	33



## Complaint Activities

This past year, the College received one complaint in May 2007. The investigation was completed in November 2007. This Investigation resulted in the occupational therapist being counseled.

After completion, the Investigation Committee completed a report back to the College on issues related to its processes and resources. Some recommendations included providing Committees with resources around completing on-line searches specifically related to best practice information, more detailed information around what College resources are available to the Committee; more resources related to report writing and policies related to file closure. The Advisory Committee to the College Complaints Process will review these recommendations in the upcoming year.



## TREASURER'S REPORT

The College has again ended its fiscal year with a surplus. The reasons range from having slightly higher-than-predicted revenues to not needing as much for incentives and training because of low numbers of sitting committee members. The board has decided that the surplus will be set aside in a fund that already exists for future peer assessment training.

The College continues to focus on a long-term fiscal strategy, including equipment and website needs, training requirements, continuing competency program planning, and much-needed changes to our human resources contracts. Our financial situation is good so there are no anticipated increases in fees and every attempt is being made to have a balanced budget.

The College Board will be looking at our legal counsel contract in the coming year. Legislative changes mean we have had to rely on opinions from counsel much more and this is reflected in an increase in the amount budgeted for this service for the coming year.

In the Auditor's report, you will note 3 internally restricted funds: Continuing Competency Fund, the Hearing Fund and the Special Projects Funds. These funds are available for use with Board approval for their designated activities. The Continuing Competency Fund for the development of the continuing competency and peer assessment programs, the Hearing Fund for costs associated with this disciplinary process and the special projects fund for specific, time limited projects related to board strategic plan/College business plan.

Sincerely,

Christine Marchessault, Treasurer

	2007-2008 ACTUAL	2008-2009 BUDGET
Membership Fees	138,312.50	138,000.00
Interest Earned	10,690.87	11,000.00
Administration Charges	1,940.00	2,000.00
<b>TOTAL REVENUE</b>	<b>150,943.37</b>	<b>151,000.00</b>
<b>EXPENSES</b>		
ACOTRO Membership	520.50	525.00
ACOTRO	2,417.29	3,500.00
Advertisement/Public Education	1,199.74	2,000.00
Advisory Committee	0.00	1,000.00
Annual General Meeting	1,161.92	1,250.00
Audit	200.00	300.00
Bank Charges	285.60	300.00
Education/Training	6,917.74	6,500.00
Employment Benefits	3,562.42	6,750.00
Equipment Purchases	1,666.06	2,000.00
Insurance (Property)	784.55	800.00
Insurance (Liability)	1,900.00	2,000.00
Legal - Retainer	855.00	850.00
Legal	7,660.76	7,500.00
Member Incentive/Remuneration	4,955.01	5,000.00
Office	1,878.59	2,750.00
Continuing Competency	21,950.54	26,000.00
Postage	2,834.68	4,500.00
Practice Committee	0.00	1,000.00
Printing	607.94	3,500.00
Purchase Service	1,292.83	4,000.00
Property Taxes	574.53	800.00
Rent	7,051.53	7,100.00
Salary (Office Manager)	14,083.35	20,000.00
Salary (Registrar)	27,500.19	36,000.00
Telephone/Internet	2,351.02	2,500.00
<b>TOTAL EXPENSES</b>	<b>114,211.79</b>	<b>148,425.00</b>
<b>NET INCOME</b>	<b>36,731.58</b>	<b>2,575.00</b>



# AUDITOR'S REPORT

## College of Occupational Therapists of Nova Scotia

Balance Sheet, March 31, 2008  
(with comparative figures for 2007)

<u>ASSETS</u>		
<u>Current Assets</u>	<u>2008</u>	<u>2007</u>
Cash	\$ 3,640.11	\$ 11,426.43
Investments	294,835.33	249,144.46
Accounts Receivable	0.00	619.21
Prepaid Expenses	641.25	641.25
<u>Total Assets</u>	<u>\$ 299,116.69</u>	<u>\$ 261,831.35</u>
<u>LIABILITIES &amp; EQUITY</u>		
<u>Current Liabilities</u>	<u>2008</u>	<u>2007</u>
Account Payable	\$ 1,659.37	\$ 552.48
Deferred Revenue	1,763.17	2,316.30
<u>Total Liabilities</u>	<u>3,422.54</u>	<u>2,868.78</u>
<u>Other Funds—Restricted</u>		
Continuing Competency Fund	44,375.97	19,375.97
Special Projects Fund	28,795.33	17,063.75
Hearing Fund	200,000.00	200,000.00
	<u>273,171.30</u>	<u>236,439.72</u>
<u>Members Equity</u>		
Balance April 1st	\$ 22,522.85	\$ 212,522.85
Add: Excess of Income over Expense	36,731.58	39,375.97
	<u>59,254.43</u>	<u>251,898.82</u>
Less: Transferred to Other funds		
Continuing Competency Fund	25,000.00	19,375.97
Special Projects Fund	11,731.58	10,000.00
Hearing Fund	-	200,000.00
	<u>36,731.58</u>	<u>229,375.97</u>
Balance March 31st	<u>22,522.85</u>	<u>22,522.85</u>
<u>Total Liabilities and Equity</u>	<u>\$ 299,116.69</u>	<u>\$ 261,831.35</u>

### Auditor's Report

The above Balance Sheet and attached Statement of Income and Expense were prepared from information supplied by the College Accountant and my audit records.

In my opinion, these statements present fairly, in all material respects, the financial position of the College at March 31, 2008 and the results of its operations for the year then ended, in accordance with generally accepted accounting principles.

\_\_\_\_\_  
Raymond Ells, Auditor



# AUDITOR'S REPORT

**College of Occupational Therapists of Nova Scotia**  
**Statement of Income and Expense**  
**For the Year Ended March 31, 2008**  
**(with comparative figures for 2007)**

<u>Income</u>	<u>2008</u>	<u>2007</u>
Membership Fees	\$ 138,312.50	\$ 130,412.50
Interest Earned	10,690.87	8,979.82
Administration Charges	<u>1,940.00</u>	<u>2,385.00</u>
	<u>150,943.37</u>	<u>141,777.32</u>
 <u>Expense</u>		
Salaries/Benefits	45,145.96	42,774.23
Continuing Competency	21,950.54	14,653.48
Legal/Audit Fees	8,715.76	2,713.63
Office Rent	7,051.53	7,082.52
Education/Training	6,917.74	3,358.40
Member Incentives	4,955.01	6,816.25
Office Supplies/Expense	4,713.27	4,598.88
ACOTRO	2,937.79	3,464.71
Insurance	2,684.55	2,684.55
Telephone/Internet	2,351.02	1,849.14
Equipment	1,666.06	1,066.67
Purchased Service	1,292.83	1,287.53
Advertising	1,199.74	1,477.67
Annual General Meeting	1,161.92	371.53
Printing	607.94	491.05
Property Taxes	574.53	750.90
Bank Charges	285.60	331.62
Practice Committee	0.00	5,253.34
Advisory Committee	0.00	1306.85
Miscellaneous	<u>0.00</u>	<u>68.40</u>
	<u>114,211.79</u>	<u>102,401.35</u>
Excess of Income Over Expense	<u>\$ 36,731.58</u>	<u>\$ 39,375.97</u>



# Continuing Competency Committee

## **Mandate**

The Continuing Competency Committee reports to the board. Its mandate is to develop, implement and evaluate the Continuing Competency Program for Occupational Therapists in Nova Scotia and to provide structure for administration of the Peer Assessment Program which ensures a minimum standard of Occupational Therapy practice in Nova Scotia.

## **Committee Membership:**

Current Members of the Continuing Competency Committee include:

Joanne Comeau (chair)  
 Jennifer Saunders  
 Karen Landry  
 Susan Sparkes  
 Dorothy Edem (coordinator)

Special thanks to the committee members for their commitment and dedication to the development of the Continuing Competency Program.

## **Meetings:**

During the 2007-2008 timeframe, the committee held eight face-face meetings. Each meeting lasted between 60 – 90 minutes. All meetings were held at the School of Occupational Therapy, Dalhousie University.

## **Accomplishments:**

Over the last year, the following milestones were achieved:

- June 22 2007, the Government of Nova Scotia passed the regulation changes necessary to implement the Continuing Competency Program Portfolio.
- In July 2007, the College launched the Continuing Competency Portfolio and the portfolios were mailed to all members.
- In November 2007, the Committee presented a workshop and a Poster presentation at the National Continuing Competence Conference in Toronto.
- In May 2008, members made a declaration on the annual registration/renewal form indicating they have maintained required sections of the Continuing Competency Portfolio for the 2007-2008 registration year.
- Between March and May of 2008, the Continuing Competency Committee and the COTNS Board held a series of education sessions across the province. The purpose of the sessions was to update members on the Continuing Competency Program and other College related matters. Ten sessions have been conducted so far. An additional 2-3 sessions will be conducted by end of June 2008. The outcomes of the sessions so far have been very positive. Members had the opportunity to learn and seek information about the Continuing Competency Program. Given the success of these sessions the committee is committed to maintaining periodic information sessions across the province.



## Continuing Competency Committee

- In May 2008, the committee started a pilot test of Section 2 of the portfolio – Assessment and Professional Development Plan. The purpose of this pilot test is to assess the overall usefulness and relevancy of the assessment toolkit developed. The expected completion date for the pilot is June 14, 2008. Forty-eight therapists volunteered to participate. The results from the pilot test will be shared with members and presented at the June AGM.

The pilot test involves the following components of Section 2 of the Portfolio:

Assessment of Current Practice & Professional Development Guide

Self Assessment Tool

Peer/Colleague and Client Feedback

Assessment of Current Practice Summary

Professional Development Plan

Professional Development Log

### 2008/2009 Work plan:

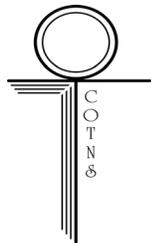
The following are targeted for the next year (2008-2009):

- Launching of Section 2 - Assessment and Professional Development Plan
- Development of Peer Assessment Program Protocol
- Creating an evaluation framework for evaluating the Continuing Competency Program

Stay tuned for further news as the Continuing Competency Program continues to evolve. The committee will continue to maintain communication with the membership. If you have questions or feedback, please contact Dorothy Edem through e-mail at [daedem@eastlink.ca](mailto:daedem@eastlink.ca).

Respectfully submitted,

Dorothy Edem



## Practice Committee

### **Mandate:**

In accordance with the Occupational Therapists Act 6(2) d,e,f, 6(3)(b), 6(7), 6(8),16, the Board convened a committee to explore, debate and provide recommendations for the Executive Committee/Board of Directors on current Occupational Therapy practice issues relevant to the mandate of the College.

### **Key Functions:**

- To regularly review and revise as deemed necessary the College Standards of Practice.
- To regularly review and revise as deemed necessary the College Refresher Education Program.
- To educate the membership on identified practice issues.
- To act as an Advisory Committee to the Executive Committee/Board of Directors on Occupational Therapy Practice.

### **Members:**

The Practice Committee is comprised of the following members:

Denise Bond (Chair)  
Jennifer Finlayson  
Nancy Garber

### **Activities:**

In addition to its scheduled work, the Practice Committee responded to a number of registrant questions around issues in practice. The Committee does its best to answer these questions with the assistance of the Registrar and College legal counsel. The Committee has begun to track these questions in order to determine trends. In addition, the Committee will begin a regular submission to the Newsletter by publishing the response to a frequently asked question. It is the hope of the Committee that this information will be of benefit to the membership.

With the assistance of occupational therapy student, Jillian Stewart, the Committee developed a work plan for the review and revision of the College's existing Code of Ethics. This project is an extensive one and the timeline for its completion is two – three years. The Committee will be consulting with the membership throughout this process.

### **Work Plan:**

In addition to beginning the review of the Code of Ethics, the Practice Committee will be reviewing the Practice Guideline: Client Records. As the Nova Scotia government is currently undergoing consultation related to Personal Health Information Legislation, the Committee will need to review the existing guideline. This will provide the opportunity for the Committee to begin a thorough review of this document including feedback from members. The Committee will also begin the development of a new practice guideline related to informed consent.



## Nominations Committee

### Mandate

The Nominations Committee is appointed at the Annual General Meeting of the College to oversee the Election of Board Members in accordance with the OT Act 7-14.

### Members

The nomination committee is comprised of the following people:

Neil Morse  
Lygia Figueiredo

### Activities

The nominations committee put out a call for nominations for two board vacancies in April 2008. Christine Marchessault and Leticia White responded by declaring their interest in completing a second term on the College Board. Christine has served as Treasurer of the Board for the past two years. Leticia is the current Board Chair. Their biographies are outlined below. No other nominations were brought forward. A call for additional nominations will be made at the AGM. If no further nominations are brought forward at that time, the positions will be acclaimed.

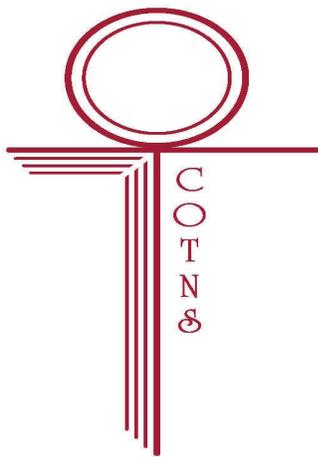
### CHRISTINE MARCHESSAULT

After a year in the physiotherapy program at McGill University, Christine "saw the light" and transferred to Occupational Therapy, graduating in 1983. She began working at St. Mary's on the Lake in Kingston, Ontario and then moved on to a French psychiatric day centre in Valleyfield, Quebec where she became more fluent in her second language. In 1986 she began private practice in Ottawa that covered a variety of clients, and then she switched to Home Care for over 2 years. In 1997 she moved with her family to Halifax and began working at the IWK where she is today - with a brief sojourn in Saint John, New Brunswick working for Extra Mural. She works in a variety of areas at the IWK and also does some private work in the Halifax area. She was involved with the committee that brought the CAOT conference to Kingston and serves on various committees at the hospital.

### LETICIA WHITE

Leticia is originally from St. John's, NL. As a graduate from McGill University's B.Sc. (OccTher) class of 2003, she has over four years of clinical practice in a variety of practice settings. Her experience began in the small community of Sioux Lookout in Northwestern Ontario. After two and a half years working in a general practice setting, Leticia ventured to Nova Scotia and began working in a manufacturing environment. Since then, Leticia has worked in private consulting/disability management and she is now working as a Case Coordinator/Occupational Therapist with the Nova Scotia Teachers Unions Early Intervention Program for Teachers.

Leticia joined the College in 2006 as the recording secretary and has moved to the Chair position for her 2007-2008 term. She has also been involved with the NSSOT since 2006.



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