

***Occupational Therapy Canada Reflection Day***

***Economic Evidence for Occupational Therapy Services:  
Crunching the Numbers, Describing Value***

**May 27, 2015**

**Winnipeg (Manitoba)**

**REPORT**

## Introduction

The 2015 *Occupational Therapy Canada* (OTC) Forum, held on the May 27 in Winnipeg (Manitoba), took the form of a reflection day entitled *Economic Evidence for Occupational Therapy Services: Crunching the Numbers, Describing Value*. With the facilitation of Dr. Colleen Metge [Director, Centre for Healthcare Innovation Evaluation Platform, Division Quality & System Performance, Winnipeg Regional Health Authority], 27 representatives from the *Association of Canadian University Programs* (ACOTUP), the *Association of Canadian Occupational Therapy Regulatory Organizations* (ACOTRO), the *Canadian Association of Occupational Therapists* (CAOT), the *Alliance of Canadian Occupational Therapy Professional Associations* (ACOTPA) and the *Canadian Occupational Therapy Foundation* (COTF) participated. The OTC Forum was organized by a working group comprising representatives from these five organizations (Andrew Freeman, Giovanna Boniface, Donna Collins, Lori Cyr, Marjorie Hackett, Gayle Salsman). The list of participants at the OTC Forum can be found at the end of this report.

## How the OTC Forum theme was chosen

This year's reflection day was a logical follow-up to the two previous OTC Forum discussions that took place in Victoria (British Columbia) in 2013 and Fredericton (New Brunswick) in 2014. The objective of the 2013 discussion was to gain a fuller understanding, from the perspectives of a range of stakeholders in our profession in Canada, of the educational, practice, regulatory, political and economic implications of occupational therapy competencies, proficiencies, advanced practice and specialization. A variety of themes, as well as topics for future collaborative action, were identified by the participants (Freeman et al., 2014). In turn, the 2014 discussion focused on identifying occupational therapy's unique contribution, defining a common vision congruent with this contribution, and articulating a plan to realize the common vision (Rappolt et al., 2015).

The focus of the 2015 OTC forum was on economic evidence for occupational therapy services. There is strong agreement within our profession in Canada and elsewhere about the need to strengthen this body of evidence (Lambert, Radford, Smyth, Morley, & Ahmed-Landeryou, 2014; Rexe, McGibbon Lammi, & Von Zweck, 2013). It is necessary not only to demonstrate that occupational therapy makes a difference for clients but that it also makes economic sense. As articulated during the 2013 OTC reflection day, "Occupational therapists, occupational scientists and occupational therapy organizations must invest in initiatives to **build evidence** of effectiveness and **cost effectiveness** of occupational therapy practices..." (Freeman et al., 2014, page 27). At the 2014 OTC reflection day (Rappolt et al., 2015, page 24), one of the five key principles identified was the following: *Economic evidence : A top priority for the occupational therapy profession in Canada is the demonstration of the **economic value** of the effectiveness of occupational therapy services for all ages and population served by occupational therapists*. Subsequently, one of OTC's four priority actions identified was **Demonstrating outcomes and cost benefits**: "As both public servants and private practitioners, occupational therapists must account for their assessments, interventions and clinical and economic outcomes. Producing **evidence** of the effectiveness and **cost benefits** of occupational therapy services is a **top priority**" (page 25).

In proposing a structure to engage representatives of Canada's five leading organizations in a strategic reflection about economic evidence for occupational therapy services, the planning group believed that one obstacle impeding our profession's progress in this area is a limited collective level of expertise. That is, while acknowledging the important efforts already made to help occupational therapists develop expertise (e.g., Law, Law, & Watson, 2014) and the gradually evolving body of research evidence (e.g., Sampson, James, Whitehead, & Drummond, 2014), many members are not necessarily equipped to participate knowledgeably in discussions about this area and thus help to advance the discussion. Consistent with this conclusion, Dr. Colleen Metge was asked to help facilitate the OTC Forum, with a view to helping participants develop a common knowledge base.

## How the day was organized

The 2015 OTC Forum was divided into three broad sections. During the first section, Dr. Metge covered the following categories in helping participants to develop their ability to use health economics to interpret findings about the value of occupational therapy:

- definition of economics and health economics;
- three important concepts for understanding economic evaluations : opportunity cost, benefit, cost;
- cost-effectiveness: measuring the value of health care services;
- key aspects of economic evaluations: costs, benefits, synthesis of costs and benefits;
- handling the uncertainty in cost-effectiveness analysis;
- judging the value of health economic evaluations;
- explaining the findings of an economic analysis.

The focus of the second section was to identify the applicability of the information, congruent with their respective mandates, for each of the five occupational therapy organizations in Canada. Each of these representative groups presented their reflections to the entire group of participants. Finally, the objective of the third section of the day, which was carried out by all participants together, was setting collective profession priorities and committing to an action plan. Detailed notes were kept of these group and collective discussions and were subsequently transcribed and analyzed in order to arrive at the following summary of the findings.

## Findings

The discussion confirmed that this year's topic, economic evidence for occupational therapy services, is a logical continuation of the discussion held at the 2014 OTC Forum. That is, advancing the development and transfer of knowledge regarding economic evidence for occupational therapy services must be aligned with the profession's reflections about its unique contribution, and the populations that are believed would most benefit from this contribution. Thus, the importance of continuing to build profession-wide consensus about these two elements was strongly reinforced, while nevertheless recognizing regional variations regarding population priorities.

It was recognized that economic evidence for occupational therapy services should build upon research evidence about the efficacy of these services. In other words, occupational therapy services ultimately need to be supported by research evidence pertaining both to their efficacy and economic benefits.

There was agreement that in order to advance the economic evidence priority, the profession's collective capacity must be developed. To this end, two distinct, yet complementary, objectives were proposed:

### **1. Develop an occupational therapy economic evidence *base case***

It would be highly beneficial to have an occupational therapy economic evidence *base case* that would model the general parameters to be included in economic evidence studies. Such a case would serve as a general template to be used by different stakeholders within the profession to advance this area. This case should be situated within an occupational therapy service that clearly reflects this profession's distinctive contribution and should pertain to a population group that is believed would clearly benefit from this contribution.

The development of a useful *base case* will require the contribution of several partners, both within and outside the profession, for example, health economics expertise, in addition to that provided by Canada's occupational therapy organizations (e.g., researchers, provincial/national associations).

It was recognized that it probably is not necessary to start at *square 1* in this process. Among other elements, it will be important to scan the literature for existing useful examples; the potential role that could be played by both entry-level and research graduate students to help advance this cause was noted.

In recognizing the steps required to achieve this goal and the fact that the profession's organizations will contribute in different ways, consistent with their respective mandates, it was not possible for the participants to propose a specific timeline. However, it was recommended that one of the OTC's priorities should be to play an overall coordinating role in helping to ensure that this goal is achieved as quickly as possible.

## **2. Further develop CAOT's clearinghouse capacity with respect to economic evidence for occupational therapy services**

It seems clear that advancing the development and transfer of knowledge about economic evidence for occupational therapy services in a meaningful way will require collective effort: the contribution of each of the profession's organizations. However, given these multiple contributions, maintaining coordination may be a challenge. To this end, the important role played by CAOT as a *knowledge clearinghouse* within the profession in Canada was recognized. It is recommended that CAOT continue to exercise this role as the economics evidence cause is advanced. As a starting point, CAOT already has a page on its Web site devoted to economic evidence:

<http://www.caot.ca/default.asp?pageid=1012>. The content of this Web page could be augmented to include: (a) the *base case*, (b) a reference list (updated on an ongoing basis by different profession stakeholders) and (c) links to useful resources.

## **Summary**

It is clear that the work carried out at the 2015 OTC Forum is merely one step in the process of advancing the important priority regarding economic evidence for occupational therapy services. Nevertheless, we strongly believe that it is a crucial step in creating collective energy and engagement in our profession in Canada. We invite all members to help build this expertise as we move forward.

***Respectfully submitted by Andrew Freeman, Giovanna Boniface, Donna Collins, Lori Cyr, Marjorie Hackett, and Gayle Salsman***

## **References**

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### List of participants

**Facilitator:** Dr. Colleen Metge, BSc (Pharm), PhD; Director, Centre for Healthcare Innovation Evaluation Platform, Division Quality & System Performance (Winnipeg Regional Health Authority)

**Coordinator of 2015 OTC forum planning committee:** Andrew Freeman, Associate Professor, Programme d'ergothérapie (Université Laval)

**ACOTUP (Association of Canadian Occupational Therapy University Programs)/ACUPE (Association canadienne des programmes universitaires en ergothérapie)**

Name	Role
Susan Rappolt	President of ACOTUP; Chair, Department of Occupational Science and Occupational Therapy (University of Toronto)
Bernadette Nedelec	Treasurer of ACOTUP; Director, Occupational Therapy Program (McGill University)
Margo Paterson	Executive Director of ACOTUP; Professor Emerita (Queen's University)
Lori Letts	Vice-President of ACOTUP; Assistant Dean, Occupational Therapy Program (McMaster University)
Donna Collins	Head, Department of Occupational Therapy (University of Manitoba)
Nadine Larivière	Directrice, Programme d'ergothérapie (Université de Sherbrooke)

**ACOTRO (Association of Canadian Occupational Therapy Regulatory Organizations)/ACORE (Association canadienne des organismes de réglementation en ergothérapie)**

Name	Role
Kim Doyle	Registrar, Newfoundland and Labrador Occupational Therapy Board (NLOTB)
Cathy Pente	Registrar, New Brunswick Association of Occupational Therapists (NBAOT)
Elinor Larney	Registrar, College of Occupational Therapists of Ontario (COTO)
Gayle Salsman	Registrar, College of Occupational Therapists of Nova Scotia (COTNS)
Coralie Lennea	Registrar, Saskatchewan Society of Occupational Therapists (SSOT)

**CAOT (Canadian Association of Occupational Therapists)/ACE (Association canadienne des ergothérapeutes)**

Name	Role
Lori Cyr	President
Nicola MacNaughton	President-elect
Alison Douglas	Director of Standards
Julie Lapointe	Director of Professional Practice
Janet Craik	Executive Director
Havelin Anand	Director of Government Affairs and Policy

**ACOTPA (Alliance of Canadian Occupational Therapy Professional Associations)/AAPEC (Alliance des associations professionnelles en ergothérapie au Canada)**

<b>Name</b>	<b>Role</b>
Giovanna Boniface	Managing Director, CAOT-BC
Laurie Warren	President, Ontario Society of Occupational Therapists (OSOT)
Brigitte Dutcher	President, New Brunswick Association of Occupational Therapists (NBAOT)
Sherry Just	President, Saskatchewan Society of Occupational Therapists (SSOT)
Aruna Ralhan	President-elect, Newfoundland and Labrador Association of Occupational Therapists (NLAOT)

**COTF (Canadian Occupational Therapy Foundation)/FCE (Fondation canadienne d'ergothérapie)**

<b>Name</b>	<b>Role</b>
Juliette Cooper	President
Marjorie Hackett	Vice-President
Juan Monterrosa	Board Member
Sangita Kamblé	Executive Director
Nathalie MacLeod Schroeder	Board Member