



Ontario Society of  
Occupational Therapists

Success in Challenging Times!

# ANNUAL REPORT 2009/10



# SUCCESS IN CHALLENGING TIMES!

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Ontario's healthcare system continues to feel the impact of the economic crisis; these are not easy times to be working in an environment of cutback, wage freezes, increasing caseloads. Yet, amidst this context of challenge, Ontario occupational therapists have much to celebrate. Indeed, we have been successful through challenging times!

**The Ontario Society of Occupational Therapists is strong and growing.** Membership numbers continue on the upward trend experienced over the past decade, resourcing the organization with valued financial resources and an engaged and engaging membership that has supported volunteerism at record levels and strong participation in Society programs and services.

**We have a secure financial footing which allows OSOT to invest in the priorities we as a profession see to be important;** priorities such as government relations support to our advocacy efforts, building a staff team that can more effectively support our volunteers, investing in activity to support members' professional development and practice excellence.

**We have been able to live the commitments of our strategic plan and new vision, ever more proactive as a leader in positioning occupational therapy** as evidenced by our work in promoting a scope of practice review, hosting of a strategic Summit on Aging and engaging a government relations agenda focused on the profession's issues, not simply responsive to the policy change and priority of the day.

**We have been successful!** 2010 will be remembered as the year in which Ontario occupational therapists moved into primary health care. The March 2010 government announcement of funding support for occupational therapists in Family Health Teams opened doors for practice with a new focus, alongside family physicians for the first time, that will enable the profession to demonstrate just how much we have to offer to support healthy community living, chronic disease management, aging at home and other primary care priorities. While the profession celebrates this policy decision that recognizes occupational therapy as a solution to important health care needs of Ontarians, there is something else that is well worth celebrating – our advocacy efforts can be successful!

Primary health care may well be the watershed success of 2010 but it does not stand alone. OSOT's continued engagement with policy reform in the province's auto insurance sector secured important successes as well. Our advocacy and work to support competence in the assessment of attendant care needs resulted in regulatory recognition of occupational therapists as primary assessors for attendant care benefits.

These important successes in challenging times are reassuring and motivating reminders that when we work together, engaging the strength and resource of our association community and living to the expectations of our common vision – ***to lead by providing vision, voice, value and visibility for Ontario occupational therapists*** – we *can* be self-determining, we *can* make a difference and we *can* continue to be successful!

Gail Teachman, President

Christie Brenchley, Executive Director

## **LEADING BY PROVIDING VISION...**

The Society's commitment to lead with vision is really a commitment to focus on our members' dreams and aspirations for the profession. Defining where we want to be and what we want to be doing is a collaborative process within our membership. OSOT's valued volunteer Teams and Task Forces, membership input and environmental scanning enable the board to identify priorities. The profession's interest to review its regulated scope of practice to ensure that occupational therapists are able to contribute to the health of Ontarians within the full range of their competence has resulted in the establishment of collaborative review project with the College of Occupational Therapists of Ontario and the academic community. With a proactive eye to the future, the Society is vested in developing a strategy to position occupational therapists as key professionals to be included in public policy to address the needs of our aging population. A successful *Summit on Aging* brought OT experts from across the province to a think tank that will be instrumental in propelling our work in this area forward. To support our visions, the profession must deliver a skilful workforce that aspires to leadership. The Society's commitment to support this vision was made visible with the recruitment of a full-time Manager of Professional Development and Practice Support.

## **LEADING BY PROVIDING VALUE...**

An association needs to earn its membership and OSOT is committed to do just that. Responding to membership needs is a strategic priority. A review of member services, utilization and feedback has identified opportunities for improvement and expansion which will include introduction of new legal advisory services, a re-developed website and new research awards in 2010-11. A focus on professional development support was evidenced in successful events including an auto insurance sector workshop, Summit on Aging and Conference 2010-*Inspiration for a New Decade*. Web resources to support member adaptation to new auto insurance regulations and practice in primary health care met identified needs.

## **LEADING BY PROVIDING VOICE...**

To support its capacity to truly lead through advocacy, the Society has invested in government relations support. This singular investment has had major impacts as evidenced by successes in primary health care and, though less visible, in the impact on organizational knowledge, confidence and profile. In 2010, advocacy efforts turned to focus on drawing attention to the critical lack of access to occupational therapy services in the province's home care system and long-term care homes. Our messaging with government and other stakeholders is resonating – occupational therapy can be part of the solution to the province's challenge with Alternate Level of Care issues! OSOT continues to be active in engaging occupational therapy in key policy consultations that will drive provincial system change. In 2009 – 2010 these included; auto insurance reform and review of the *Statutory Accident Benefits Schedule*, development of a provincial 10 year Mental Health and Addictions Strategy and the School Health Support Services Review. These strategic priorities of our health system will define the environment and policy context for future practice of occupational therapy – how important that our voice, a strong provincial professional association be heard!

## **LEADING BY PROVIDING VISIBILITY...**

OSOT's strategic commitment to engage a marketing strategy to improve public awareness remains a high priority but was deferred attention in 2009-2010 because occupational therapy was selected as one of five professions to be promoted in an Allied Health Strategy by HealthForceOntario. This collaborative initiative with government will launch in 2011 with a radio and print campaign, "*Here when you need us!*"; targeted to improve public awareness of allied health professions. OSOT's own marketing strategy will build on this initiative in 2011.

# FINANCIALS

## STATEMENT OF FINANCIAL POSITION

AS AT SEPTEMBER 30, 2010

	2010	2009
<b>ASSETS</b>		
Current assets		
Cash	\$ 781,670	\$ 512,448
Guaranteed Investment Certificates	514,000	558,000
Accounts receivable	29,670	65,971
Prepaid expenses	<u>20,485</u>	<u>16,110</u>
	<u>\$ 1,345,825</u>	<u>\$ 1,150,529</u>
<b>LIABILITIES AND NET ASSETS</b>		
Current liabilities		
Accounts payable and accrued liabilities	\$ 22,021	\$ 14,948
Prepaid membership and insurance fees	<u>524,623</u>	<u>456,145</u>
	<u>546,644</u>	<u>471,093</u>
Net assets (note 5)		
Reserve fund	230,000	215,000
Undesignated	<u>569,181</u>	<u>464,436</u>
	<u>799,181</u>	<u>679,436</u>
	<u>\$ 1,345,825</u>	<u>\$ 1,150,529</u>

## STATEMENT OF OPERATIONS AND NET ASSETS

FOR THE YEAR ENDED SEPTEMBER 30, 2010

	2010	2009
<b>REVENUE</b>		
Membership dues	\$ 503,086	\$ 453,300
Conferences and workshops	238,304	134,232
Web site and other advertising	21,699	26,721
Investment income	14,121	20,915
LMS prolink contract	12,487	11,535
Employment grant (SEED) and other	6,312	6,488
Public relations/professional resource sales	<u>2,311</u>	<u>4,711</u>
	<u>798,320</u>	<u>657,902</u>
<b>EXPENSES</b>		
Personnel	282,982	222,304
Office and administrative	151,910	136,041
Governance	21,597	20,224
Member services direct costs		
Conferences and workshops	163,582	37,664
Special projects	27,349	12,461
Government relations	17,078	24,000
Legal Advisory Services	7,035	7,035
Policy and professional promotion	5,034	7,515
Other member services	<u>2,008</u>	<u>1,398</u>
	<u>678,575</u>	<u>468,642</u>
<b>EXCESS OF REVENUE OVER EXPENSES FOR THE YEAR</b>	119,745	189,260
Net assets, beginning of year	<u>679,436</u>	<u>490,176</u>
<b>NET ASSETS, END OF YEAR</b>	<u>\$ 799,181</u>	<u>\$ 679,436</u>

A complete set of audited financial statements for the year ending September 30, 2010 as prepared by Cowperthwaite Mehta, Chartered Accountants is available from the OSOT Office.

The Society has achieved a sound financial position which is managed to resource activity and initiatives guided by the strategic plan to

- Strengthen OSOT's paid and volunteer human resources
- Promote access to OT services across health care sectors and the continuum of care in Ontario
- Engage in a public awareness marketing initiative
- Make OSOT the definitive "go to" resource for Ontario occupational therapists
- Support practice excellence and leadership in our members

A growing membership base and successful workshops and Conference 2010 have contributed to revenues that exceed budgeted targets. This, coupled with expense savings due to staffing transitions, has resulted in a year end surplus of revenue over expenses. This position enables the Society to invest in special projects in the coming year which will include website re-development, a strategic marketing initiative and continued utilization of the government relations firm.

## OSOT MEMBERSHIP 2009 – 2010

Total membership .....	3439
Practising full-time .....	2042
Practising part-time .....	490
Not practising .....	208
New graduate .....	158
Student members .....	525
Associate members .....	8
Life members .....	8

**Growth over 2008/9 ..... 8%**

Practising in hospitals .....	36%
Practising in the community .....	55%
Practising in other settings .....	9%
Working with children .....	1341
Working with adults .....	2060
Working with seniors .....	1135
Working in the private sector .....	46%
Working in the public sector .....	80%

Member data taken from OSOT Membership Data Profile 2009 – 2010. Data reflects member reported information and may reflect that members work in multiple sectors.