Our Mission

The mission of the College of Occupational Therapists of British Columbia is to protect the public by regulating, advocating and advancing safe, ethical and quality occupational therapy practice in British Columbia.
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**Annual General Meeting**

Registrants and members of the public are warmly invited to join the College Board and staff at the College’s Annual General Meeting. The meeting will be held in Richmond, BC on Saturday, November 5, 2005 from 9:00 am - 10:15 am.

Please contact the College for more details about the AGM and other activities planned for the day and to confirm your attendance.

We can be reached by:
Tel: (250) 386 - 6822 or Toll free in BC (866) 386 - 6822
Email: info@cotbc.org or visit our website at www.cotbc.org to download the AGM Registration Form.
Joint Message from the Chair and Registrar

2005 marks the 5th anniversary of the college. This milestone provides an excellent opportunity for us to reflect on the journey we have traveled, to celebrate the successes achieved and to prepare for the work ahead. We are delighted to present the annual report and will highlight accomplishments framed within the context of our strategic plan.

The strategic plan was re-visited in June 2004 and was the outcome of a development session conducted in October 2002. It articulates the collective vision of the board and committee members by formulating strategic directions which focus activities on four key results areas. Each year, the goals and achievements under each key result areas are reviewed to ensure the college is moving effectively and efficiently towards its mission.

Strategic Direction—Provide responsive and accountable governance

The board participated in a development session to explore the concept of Inspiring Leadership and to reflect on an explicit leadership model to sustain a healthy governance culture. As each board member brings diverse experiences and perspectives to the table, the creation of a leadership model unique to the college provides a powerful tool for fostering the organization’s culture and steering its work to fulfill its mission.

The nominations panel of the board continues to review board election and committee appointment processes and to develop strategies to sustain and support registrant participation on the board and committees. It completed a logic work-plan to guide activities for 2005-2007. As well, principles to guide the appointment of registrants in the event of an elected-board position vacancy and a draft policy are to be presented to the board this Fall.

A new Governance Manual will assist board members to understand their roles and responsibilities. A board panel will review the document’s format and content to ensure that it reflects excellent governance principles and practices, including board accountability.

A competency-based performance review for the registrar was implemented. The system promotes “360 degree” participation for feedback from board members, committee chairpersons and external stakeholders such as members of the Association of Canadian Occupational Therapy Regulatory Organizations. Registrar performance expectations are linked to the college’s strategic plan activities.

A review of our bylaws was initiated this year. Bylaws provide for the rules of operation of the college under the Health Professions Act and this marks the first comprehensive review since our first bylaws were approved in February 2000. The bylaws review is being conducted as a quality improvement activity and to ensure compliance with the amendments to the Health Professions Act.

Strategic Direction—Promote and monitor registrant competence

A detailed account of the activities in this area is provided in the committee reports section, but we wish to draw your attention to a few significant accomplishments for this year.

We conducted an evaluation of our first practice guideline, Assigning of Service Components to Unregulated Support Personnel published in 2004. Using a quality improvement framework, registrants responded to a detailed survey on the practice guideline. Registrants’ feedback confirmed the guideline content was comprehensive and relevant, and successfully guided sound decision making regarding assigning occupational therapy services. The second practice guideline on Management of Client Information (working title) is anticipated for board review in the Fall 2005.

A pilot study of the Self-Assessment Tool and Professional Development Plan, the first component of the continuing competence program was initiated in June 2005. Over 96 registrants volunteered to participate and feedback will be used to guide revisions prior to final approval by the board for a registrant-wide launch.

Guidelines for prevention of misconduct of a sexual nature are being finalized for board review. The tremendous participation at Drawing the Line—Professional Boundaries in Occupational Therapy Practice, an interactive forum held at last year’s annual general meeting, was invaluable in obtaining current and relevant information for its development.

Published in the Fall 2004 and Spring 2005, the college newsletter continued to inform registrants. Topics included updates on relevant legislation, results of committee initiatives and feature articles on the inquiry committee and complaints process. Three issues are planned for the coming year.

Finally, the review of the college’s current code of ethics is well underway. The board will participate in a facilitated session this Fall to provide feedback and direction to the panel steering this project.

Strategic Direction—Encourage and support registrant participation in college activities

Registrants continue to participate actively in our college. We again had an election for the registrant board member positions. To date, most committee vacancies are filled through re-appointment of registrants that confirm their interest to remain part of a committee. Registrants report that they find the committee work rewarding and their contribution valued. Registrants’ response rate this past year to our surveys and the participation in our professional boundaries forum was impressive. These all bode well for our goal to sustain and enhance registrant participation in the college.
The college strives to be responsive to registrant practice issues or education needs. Along with responding to over 150 individual registrant practice or ethical questions by telephone, the registrar provided seven education sessions across the province in Victoria, Richmond, Kamloops, Vernon, Nanaimo and two in Vancouver. These sessions are initiated and organized by registrants on topics relevant to them. We have had positive outcomes in using “just-in-time” consultants for committee development and support. It has been cost effective and efficient to acquire domain expertise selected to match the needs of particular committee initiative. For example, consultants have provided assistance in the areas of quality improvement and program evaluation, and identifying and communicating effectively with all our audiences. The web site continues to be developed—the “What’s New” section, updates to information and resources/links page and online access for registrants. Online access encourages registrants to visit and participate in activities such as practice guideline surveys and expression of interest to participate in pilot studies.

**Strategic Direction—Enhance Public Awareness**

Increasing the public’s understanding of what they can expect from registered occupational therapists as well as the role of the college in assuring safe, ethical and competent practice are important activities for the college. Some of the efforts this year focused on employers. The registration committee developed general supervision guidelines to inform the public—primarily employers—of their obligations when hiring provisional registrants. The registrar also responded to several recruitment advertisements and assisted employers to accurately reflect the requirement for registration.

Alerted by a request for verification of a person’s registration by a member of the public, the registrar directed two individuals to cease using the title “occupational therapist” as they were not registrants of the college and not qualified to provide occupational therapy services.

The Inquiry Committee initiated work on a public information brochure and information for the web site.

Upon reflection it appears that this has been a year of development with the college now poised to launch several initiatives over the coming year. At our five year mark, we are certainly proud of our progress and looking ahead to the next five years.

On behalf of the board, we extend our sincere thanks to the countless registrant and non-registrant volunteers, past and present, who gave generously of their time, energy and talent in support of the work of the college. Whether you participated on a committee, responded to a survey or organized a college event, the college depends on you to achieve its mission and reach its goals. We also want to acknowledge the staff in the college office for their excellent assistance in ensuring smooth and effective operations.

Respectfully submitted,

**Jillian Rihela**
CHAIR

**Kathy Corbett**
REGISTRAR
We thank you for contributing your time and talents in assisting the College to achieve its mission.

**Board of the College**
(from July 1, 2004 to January 31, 2005)

**Board of the College**
(from February 1, 2005 to June 30, 2005)

**BACK ROW (Left to Right):**
Nancy Sheehan, appointed public member; Risa Greenwood, elected member; Jennifer Dickson, elected member; Angenita Gerbracht, Chair & elected member

**FRONT ROW (Left to Right):**
Mary O’Callaghan, appointed public member; Jillian Rihela, Vice-chair & elected member; Jan Gauthier, elected member

*Absent: Lynda Casey, appointed public member; Caroline Ehmann, elected member*

**BACK ROW (Left to Right):**
Nancy Sheehan, appointed public member; Angenita Gerbracht, elected member; Jeff Boniface, elected member; Mary O’Callaghan, appointed public member

**FRONT ROW (Left to Right):**
Caroline Ehmann, Vice-chair & elected member; Jan Gauthier, elected member; Jillian Rihela, Chair & elected member; Lynda Casey, appointed public member

*Absent: Jennifer Dickson, elected member*
Governance Structure

**College Board**
Comprised of six elected registrants and three public representatives appointed by the Minister

- **Registration Committee**
  Responsible for all aspects of registration and working with Quality Assurance Committee on matters related to re-entry to the profession

- **Quality Assurance Committee**
  Responsible for quality assurance programs such as continuing competence, standards of practice, professional ethics and re-entry to the profession
  Assistance provided by two subcommittees: Standards Committee & Continuing Competence Committee

- **Client Relations Committee**
  Responsible for establishing programs for the prevention of misconduct of a sexual nature including educational requirements for registrants, establish guidelines for conduct and provide information to the public regarding responsibilities of registrants

- **Inquiry Committee**
  Responsible for investigating complaints and has authority to make decisions including referring the matter for a discipline hearing

- **Discipline Committee**
  Conducts hearings on matters referred by the Inquiry Committee and takes action to discipline a registrant when practice or conduct does not meet expected standards

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**College Organization**

- **Board of the COTBC**
  (Six Elected Full Registrants & Three Appointed Public Members)

- **Committees**
  - Registration
  - Quality Assurance
    - Standards
    - Continuing Competence
  - Client Relations
  - Inquiry
  - Discipline

- **Registrar**

- **Legal Counsel**

- **Inspectors**

- **Accountant/Auditor**

- **Consultants**

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College of Occupational Therapists of British Columbia
Mandate

The Registration Committee is responsible for granting registration as a registrant of the College of Occupational Therapists of British Columbia. The committee must grant registration to every person who, in accordance with the bylaws, applies for registration, satisfies the committee that he or she is qualified to be a registrant, and pays the required fees as set forth by the bylaws. A person whose application for registration is refused by the Committee may appeal the refusal to the Supreme Court of British Columbia.

Membership

In accordance with section 15 of the bylaws, the committee is comprised of at least 5 persons appointed by the Board, including one elected member, one appointed member and at least 3 full registrants. Committee members serve a term of two years and are eligible for re-appointment for a maximum of three terms.

2004/2005 Members
Debra Morgan, registrant & Chair
Elise Murphy, registrant
Tracy Newlands, registrant
Jill Rihela, elected Board member & Vice-Chair
Nancy Sheehan, appointed Public Board member

Meetings

Our annual full day in-person meeting was held October 16, 2004. This meeting time was used to review and revise the committee’s logic work plan and to consider the impact of the Health Professions Amendment Act on committee’s activities. The national regulators review of the Mutual Recognition Agreement and the CAOT Examination were also discussed.

The Registration Committee met monthly by teleconference. The committee also considered registration applications through thirty electronic meetings.

Work Plan Highlights

The committee’s work-plan focused on its five key roles: Grant registration for applicants pursuant to the College Bylaws; Develop and monitor effectiveness of registration policies; Inform registrants & the public about the responsibilities of registration; Complete the review of the re-entry program; and, Advise and report to the Board.

Work was completed on the following projects:

- A policy for General Supervision of Provisional Registrants Who Have Not Met the Examination Requirement was developed and approved by the board on April 16, 2005. This policy includes guidelines for the general supervision of provisional registrants, defines general supervision, outlines the requirements of the full registrant practice supervisor and gives examples of supervisory activities. This policy has been well received by employers and the registrant responsible for supervising a provisional registrant.
- Pursuant to the amendments of the Health Professions Act, a policy authorizing the Registrar to act as the registration committee was developed and approved by the board on April 16, 2005. This policy outlines the scope of authority of the registrar and specifies applications that must be brought before the Registration Committee. The registrar provides the committee with a quarterly statistics audit report concerning the disposition of applicants for registration. This delegation of authority is to be reviewed annually by the committee. This has improved the efficiency and effectiveness of the committee.

Four committee members (three registrants and one public member) participated jointly with College of Occupational Therapy of Ontario in their Academic Review Tool Research Project. COTBC committee members completed evaluation questionnaires for the review of four academic curriculums. The committee is hopeful that the results of this project will prove valuable in evaluation of foreign trained applicants for applying for registration in BC.

Work initiated in 2004-2005 and in progress includes:
- Development of an evaluation tool for assessment of entry-level competence for individuals completing a re-entry supervised practice review.
- Discussion around the impact of the revision of the HPA, including recommendations for by-law revisions.

Respectfully submitted,
Debra Morgan
CHAIR, REGISTRATION COMMITTEE 2004/2005
Registration Committee Report: Registration Statistics

Number of New Registrants by Year

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Number of Registrants by Year

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<td>2003-2004</td>
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<td>131</td>
<td>132</td>
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<tr>
<td>2004-2005</td>
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<td>132</td>
<td>133</td>
<td>134</td>
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Where Applicants Received Entry-level Education

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<td>2004-2005</td>
<td>137</td>
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<td>138</td>
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</tbody>
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Legend:
- Full Registration
- Provisional Registration
- Re-Entry, Temporary & Non-Practising

Number of Registrants Cancelled from the Register*

* Cancelled for failure to renew or registrants resigning from register.

Legend:
- 2004-2005
- 2003-2004
- 2002-2003
- 2001-2002

Profile of Registrants

- Re-Entry, Temporary & Non-Practising
- Full Registration
- Provisional Registration

Legend:
- Entry Level Education in BC
- Entry Level Education in Canada
- Internationally Trained Applicants
Mandate
As provided in sections 25 to 35 of the Health Professions Act, (the Act) the Inquiry Committee investigates matters that are raised in complaints against registrants. By definition in the Act, a “registrant” also includes a former registrant of the College.

The Committee may also investigate a registrant on its own motion (i.e. without a complaint) with regard to a contravention of or failure to comply with the Act, regulation or bylaws, professional misconduct, competence to practice or any disturbance or addiction which impairs the ability to practice.

Once the Committee is satisfied with the investigation, it decides on the course of action. The Committee may take no further action, take any action the Committee considers appropriate to resolve the matter between the complainant and the registrant, request the registrant to undertake not to repeat the misconduct, request the registrant to take educational courses, request the registrant to consent to a reprimand, request the registrant to consent to any other action specified by the Committee, or direct the Registrar to issue a citation for a disciplinary hearing.

Membership
In accordance with section 16 of the bylaws, the committee is comprised of at least 5 members appointed by the Board, including one elected member, one appointed member and at least 3 full registrants. Members are eligible for re-appointment for a maximum of three terms.

2004/2005 Members
Caroline Ehmann, Chair & elected Board member
Nancy Sheehan, appointed Public Board member
Nicole Penner, registrant
Sandra Bressler, registrant
Lindsey Townsend, registrant

Meetings
The Committee met by teleconference for four meetings, and attended two in-person meetings to consider complaint matters and policy development.

Activities
There were four new complaints to the Inquiry Committee for 2004-2005. Of these, two complaints were not investigated as the College did not have jurisdiction. In one case, the individual named in the complaint was not an occupational therapist and, following clarification that the person was not illegally using the title occupational therapist, the complaint was forwarded to the appropriate regulatory body. In the other case, an individual was found to be using title illegally and was issued a cease and desist order.

The two other new complaints are currently in various stages of investigation.

Work-plan Highlights
While the key role of the committee is to respond to complaints regarding the practice, conduct or ethics of registrants, the committee also continues to focus on activities to develop or improve the College’s investigation and inquiry systems. The committee’s complaint tracking tool, implemented last year to gather statistics on the complaint processes, was modified. The committee is using the Essential Competencies of Practice 2nd Edition to classify and describe complaints to the college. By linking to our essential competencies, this will assist the committee in informing the Board, committees and registrants about the nature of practice concerns coming to the college.

The committee initiated work on an inquiry committee handbook and will include such topics as investigation planning, complaint analysis, inspector appointment, report formats and training of inspectors and committee members. Training of inspectors continues as needed, and one inspector will be attending a formal certification investigator training program in September 2005.

The Committee recognizes the potential educational benefit to all registrants of publishing general, non-identifiable information about the nature of the complaints received and the decisions of the committee. This year, a two-part feature article was published in the Fall 2004 and Spring 2005 issues of the college newsletter. This comprehensive article provided details for registrants on the inquiry committee processes, the role of inspectors, where complaints come from, and lessons learned.

In preparation for developing additional publications to inform the public and communicate with registrants about the college’s approach to complaints, the committee developed principles to guide the work of the committee.

The committee continues to explore mediation or alternate dispute resolution (ADR) and how it might be built into our inquiry process to resolve complaint matters. Efforts this year included a presentation to the committee from a legal officer with the Dispute Resolution Office, Ministry of Attorney General.

Two committee members attended a two-day seminar titled Administrative Justice: Practice & Procedure for Decision Makers in Professional Regulatory Agencies sponsored by the BC Council of Administrative Tribunals. Building and sustaining member knowledge and skills is critical to an effective committee and is supported by the college.

Respectfully submitted,

Caroline Ehmann
CHAIR, INQUIRY COMMITTEE 2004/2005
Inquiry Committee Report continued . . .

Where do Complaints Originate?

<table>
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<th>Source</th>
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<td>Clients</td>
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<tr>
<td>Other Health Professionals</td>
<td>7</td>
</tr>
<tr>
<td>Occupational Therapists</td>
<td>2</td>
</tr>
<tr>
<td>Agency/Organization</td>
<td>5</td>
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Complaints Received (to date)

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<tr>
<th>Year</th>
<th>Count</th>
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<tr>
<td>2001</td>
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<td>2002</td>
<td>3</td>
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<tr>
<td>2003</td>
<td>7</td>
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<tr>
<td>2004</td>
<td>8</td>
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<tr>
<td>2005</td>
<td>3</td>
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</tbody>
</table>

Total Number of Complaints Since July 1, 2000: 25

Practice Environment and Resolution of Complaints

Public Sector: 13

Private Sector: 12

PUBLIC SECTOR

Complaints withdrawn by complainant: 1
Decisions to take no further action: 6
Decisions where registrant requested to take action: 1
Complaints regarding alleged misuse of title occupational therapist: 0
Complaints where college did not have jurisdiction to investigate: 3
Complaints in Progress/Investigations in Process: 2
Citation and case referred to Discipline Committee: 0

PRIVATE SECTOR

Complaints withdrawn by complainant: 0
Decisions to take no further action: 4
Decisions where registrant requested to take action: 2
Complaints regarding alleged misuse of title occupational therapist: 3
Complaints where college did not have jurisdiction to investigate: 3
Complaints in Progress/Investigations in Process: 1
Citation and case referred to Discipline Committee: 0
Discipline Committee Report

**Mandate**

The Committee’s mandate is to conduct hearings to consider cases sent to a discipline hearing by citation from the Inquiry Committee.

**Membership**

In accordance with section 17 of the bylaws, the members consist of at least five members appointed by the board, including one public representative or one appointed Board member, one elected Board member and three full registrants. The appointments shall be for a term not more than five years, with re-appointment for a maximum of three terms.

2004/2005 Members
Michele Becker, registrant & Chair
Betty Third, registrant
Catherine Backman, registrant
Jeff Boniface, elected Board member (from February 1, 2005)
Risa Greenwood, elected Board member (to January 31, 2005)
Vacancy—appointed Public Board member or Public representative

Meetings

The Discipline Committee was not active in 2004/2005 as there were no hearings.

Respectfully submitted,
Michele Becker
CHAIR, DISCIPLINE COMMITTEE 2004/2005

Quality Assurance Committee (QAC) Report

**Mandate**

As described in the College of Occupational Therapists of British Columbia bylaws Section 18, the Quality Assurance (QA) Committee is responsible for making recommendations to the board with respect to continuing competency program, re-entry to the profession, standards of practice, practice guidelines and professional ethics.

There are two subcommittees to QAC including: Standards Committee and Continuing Competence Committee.

The Registration Committee has assumed the lead in the re-entry to profession program.

The QA committee provides ongoing support as requested to the above committees.

**Membership**

In accordance with the section 18 (1) of the bylaws the committee consists of at least five (5) persons appointed by the board, including one (1) board member appointed by the Minister, one (1) elected board member and three (3) full registrants. The appointments are currently for a two-year term, and committee members may be re-appointed for a maximum of three terms.

2004/2005 Members
Angenita Gerbracht, Chair & elected Board member
Mary O’Callaghan, appointed Public Board member
Cathy Busby, registrant
Judith Moscovitch, registrant
Susan Rechel, registrant (newly appointed March 19, 2005)
Twyla Ross (to January 31, 2005)

**Meetings**

The main activity of the QAC has been to take the lead on the COTBC: Code of Ethics Review. A steering panel was struck for this purpose. Its membership includes the QA committee members, a member from the Client Relations committee and the registrar.

The steering panel has also been fortunate to have the following individuals assist the panel: Dr. Janet Storch, University of Victoria and Scholar in Ethics; Barbara Saunders, Quality Improvement Consultant / Facilitator; Mary Clark Green, Writer and Communications Advisor.

Judy Moscovitch and Cathy Busby are co-chairs for the Code of Ethics Review Steering Panel.

As part of this project the QAC has met by teleconference for three meetings and attended five in-person meetings.
Quality Assurance Committee (QAC) Report continued . . .

Code of Ethics Review: Work-plan Highlights

An environmental scan was undertaken by the panel. The college’s current code of ethics was reviewed in relation to other codes across provincial, national and regulatory organizations and professional disciplines.

Some committee members attended various workshops, meetings, and conferences related to ethics including the following: Rehabilitation Ethics Workshop; Ethical Voices Conference and the professional issues forum on developing an ethics framework at the CAOT national conference.

The panel confirmed that COTBC code of ethics needed to be rewritten to more clearly link to mission of COTBC. It was recognized that the revised code needed to provide the public and registrants with a clear guide for ethical practice. The panel also confirmed that there is no code of ethics that the panel wished to recommend for adoption in its entirety and confirmed that there was no one code that the panel considered adequate to adapt and modify. The panel began the process of drafting a new code of ethics for COTBC.

The process to date resulted in development of a draft document that will be shared with the Board in September 2005. The current draft document frames nine values, value statements to define each value and responsibility statements to describe the expectations under each value.

Following the facilitated session with the Board in September, the draft will be revised in anticipation of a wider consultation process.

Respectfully submitted,
Angenita Gerbracht
CHAIR, QUALITY ASSURANCE COMMITTEE 2004/2005

Continuing Competence Committee Report

Mandate

As described in the College of Occupational Therapists of British Columbia bylaws

Section 18 (5) c, the Continuing Competence Committee is responsible for reporting to the Quality Assurance Committee and the Board, recommendations for establishing and monitoring adherence to standards for continuing competence for registrants.

Membership

In accordance with section 18 (5)-b of the bylaws the committee consists of at least five (5) full registrants appointed by the board. The appointments are for a two-year term, and committee members may be re-appointed for a maximum of three terms.

2004/2005 Members
Emma Christensen, registrant & Chair
Dawn Daechsel, registrant & Vice-Chair
Risa Greenwood, registrant & elected Board member
Jennifer Dickson, elected Board member
Isabelle Boisvert, registrant
Alison Gerlach, registrant (to February 3, 2005)

Meetings

Meetings included five in-person full day meetings and two teleconferences.

Work-plan Highlights

Consistent with two occupational therapy regulatory organizations (COTO & AAROT) and approaches used by other health professions (both in BC and in other Canadian jurisdictions), the committee focused its work on the development of a draft Self Assessment Tool, based on the Second Edition of the College’s Essential Competencies of Practice for Occupational Therapists in Canada (ACOTRO, 2003).

Following Board approval in April 2005, the committee initiated a pilot study in June 2005 of the Self-Assessment Tool, the Professional Development Plan and the instruction guide. Using a quality improvement approach, the committee requested volunteer participation from registrants to complete the tools and provide feedback by way of a structured survey. By June 30, 2005 the volunteer rate was encouraging. The committee will undertake to review the data at the conclusion of the pilot study (August 31, 2005), revise the tools based on the results and present the package to the Board for final approval for registrant wide launch.

The committee wishes to acknowledge the leadership of the College of Occupational Therapists of Ontario who generously provided the COTBC with permission to use and adapt their self-assessment materials including their instruction guide scenarios and self-assessment tool. The committee was also able to benefit from the experience and the evidence gained from the formal evaluations COTO has conducted on its quality assurance program.

Respectfully submitted,
Emma Christensen
CHAIR, CONTINUING COMPETENCE COMMITTEE 2004/2005
Standards Committee Report

Mandate

As described in the College of Occupational Therapists of British Columbia bylaws

Section 18 (4), the Standards Committee, reports to the Quality Assurance Committee and is responsible for the development of standards of practice, practice guidelines and advisory statements. All draft standards, guidelines and advisory statements must be circulated to the Board for approval prior to circulation of such drafts to the registrants for discussion [s.18(4) d].

Membership

In accordance with section 18 (4)-b of the bylaws the committee consists of at least five (5) full registrants appointed by the board. The appointments are for a two-year term, and committee members may be re-appointed for a maximum of three terms.

2004/2005 Members
Helen Turner, registrar & Chair
Hilary MacInnis, registrar & Vice-Chair
Sandy Daughen, registrar
Suzanne Leach, registrar
Sarah Bryant, registrar

Meetings

Meetings included four in-person full day meetings and four teleconferences. Work also progressed using a web-based process for standards development.

Work-plan Highlights

Committee work-plan activities focused on the following key roles:

Develop & Maintain Practice Guidelines:

The committee continued its work on the next practice guideline on management of client records titled “Gathering, Using, Documenting and Protecting Client Information” (working title only). The committee completed a review of a wide range of documents and created our evidence knowledge-base of references and “evidence” used in the development of the guideline. A consultant, Ms. Ginny Fearing assisted with development of early drafts for committee review.

The committee had a presentation from college legal counsel on “documentation”. This information assisted the committee in framing the legal, professional and regulatory obligations for this guideline.

A final draft is nearing completion and will be shared with the Board for feedback in the Fall.

Monitor Practice Issues, Trends and Relevance of Guidelines

The committee conducted an evaluation of the College’s first practice guideline on Assigning of Service Components to Unregulated Support Personnel. Using a quality improvement approach 124 registrants responded to the college’s survey. Overall the results of the survey confirmed that the guideline was successful in:
• clearly describing the occupational therapist’s key responsibilities and practice expectations regarding assignment; and
• appropriately supporting sound decision-making when occupational therapy service components are assigned to unregulated support personnel.

The committee also published an article on the survey in the Spring 2005 issue of the college newsletter.

The committee used the survey evaluation data to establish a new quality improvement initiative – to develop and implement an educational campaign to foster the use of the critical thinking tool (the decision loop tool) by registrants in a variety of treatment settings, contexts and roles. This work will be initiated in the next year.

Respectfully submitted,

Helen Turner
CHAIR, STANDARDS COMMITTEE 2004/2005
**Mandate**

The Client Relations Committee makes recommendations to the board regarding client relations programs, including measures for addressing professional misconduct of a sexual nature. The measures for preventing or dealing with professional misconduct of a sexual nature must include educational requirements for registrants for preventing misconduct of a sexual nature, guidelines for the conduct of registrants with their clients, and the provision of information to the public regarding both the responsibilities of registrants and the College’s complaint and discipline process.

**Membership**

In accordance with section 19 of the bylaws, the committee is comprised of at least 5 persons appointed by the Board, including one elected member, one appointed member and at least 3 full registrants. Committee members serve a term of two years and are eligible for re-appointment for a maximum of three terms.

2004/2005 Members
Jan Gauthier, Chair & elected Board member
Lynda Casey, appointed Public Board member
Allyson Muir, registrant & Vice-Chair
Erwin Fung, registrant
Tannis Hill, registrant

**Meetings**

The Client Relations Committee met four times, attending three in-person meetings and one teleconference.

**Work-plan Highlights**

The committee work-plan activities focused primarily on two of its five key roles.

*Establish Guidelines for Conduct of Registrants*

Work continued this year to draft guideline statements. The committee focused on drafting guideline statements that will assist registrants in critically appraising their behaviour with respect to professional boundaries related to sexual conduct/misconduct.

The committee also focused on developing and adapting scenarios that are clinically relevant and that cover a wide range of practice areas for inclusion in the guidelines. The committee drew heavily on the work from the committee’s professional boundaries registrant forum held in November 2004.

The college communications consultant provided a committee development session on *Communicating the Guidelines to Our Audiences*.

The presentation described elements of achieving quality communication—communications that consider the audience needs, motivations, have clear objectives, key messages and are consistent with the values and philosophy of the college.

The committee identified the learning objectives for the final guidelines document that will guide the committee as it finalizes its work.

*Develop a Prevention Oriented Education Program for Registrants*

The committee sponsored an interactive seminar titled “Drawing the Line: Professional Boundaries in Occupational Therapy Practice”. The seminar was designed to raise awareness about professional boundaries and to introduce the concept of prevention of misconduct and why it is relevant to everyday practice. Another important objective of the seminar was to solicit examples from registrants where the risk of inappropriate behaviour could be identified and used to develop the college guidelines.

The committee also conducted a survey that asked registrants about their knowledge of misconduct issues. Ninety-four registrants responded to the survey and over ninety registrants attended the forum. The committee was very encouraged by the level of interest and participation in the topic.

Results from the interactive forum and the survey were analyzed and will be used to develop the guidelines.

Respectfully submitted,

Jan Gauthier
CHAIR, CLIENT RELATIONS COMMITTEE 2004/2005
Auditors' Report

To the Board of Directors of
College of Occupational Therapists of British Columbia

We have audited the statement of financial position of College of Occupational Therapists of British Columbia as at June 30, 2005 and the statements of revenue and expenditures, changes in net assets and cash flows for the year then ended. These financial statements are the responsibility of the College’s management. Our responsibility is to express an opinion on these financial statements based on our audit.

We conducted our audit in accordance with Canadian generally accepted auditing standards. Those standards require that we plan and perform an audit to obtain reasonable assurance whether the financial statements are free of material misstatement. An audit includes examining, on a test basis, evidence supporting the amounts and disclosures in the financial statements. An audit also includes assessing the accounting principles used and significant estimates made by management, as well as evaluating the overall financial statement presentation.

In our opinion, these financial statements present fairly, in all material respects, the financial position of the College as at June 30, 2005 and the results of its operations and its cash flows for the year then ended in accordance with Canadian generally accepted accounting principles.

Victoria, Canada
August 10, 2005

Grant Thornton LLP
Chartered Accountants

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F (250) 381-4623
E Victoria@GrantThornton.ca
W www.GrantThornton.ca

Canadian Member of Grant Thornton International
## College of Occupational Therapists of British Columbia
### Statement of Revenue and Expenditures

**Year Ended June 30**

<table>
<thead>
<tr>
<th></th>
<th>2005</th>
<th>2004</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Revenue</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Application fees</td>
<td>$31,050</td>
<td>$25,429</td>
</tr>
<tr>
<td>Registration fees</td>
<td>486,770</td>
<td>464,937</td>
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<tr>
<td>Interest</td>
<td>18,332</td>
<td>20,631</td>
</tr>
<tr>
<td>Other</td>
<td>2,456</td>
<td>121</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>538,608</td>
<td>511,118</td>
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<tr>
<td><strong>Expenditures</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Accounting and legal</td>
<td>27,570</td>
<td>31,713</td>
</tr>
<tr>
<td>Amortization</td>
<td>3,428</td>
<td>10,409</td>
</tr>
<tr>
<td>Board and committee</td>
<td>22,397</td>
<td>19,306</td>
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<tr>
<td>Communication</td>
<td>6,924</td>
<td>6,953</td>
</tr>
<tr>
<td>Consulting</td>
<td>26,115</td>
<td>43,829</td>
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<tr>
<td>Honoraria and per diems</td>
<td>21,823</td>
<td>17,109</td>
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<tr>
<td>Insurance</td>
<td>5,470</td>
<td>5,041</td>
</tr>
<tr>
<td>Miscellaneous</td>
<td>2,423</td>
<td>1,924</td>
</tr>
<tr>
<td>Office</td>
<td>22,614</td>
<td>27,135</td>
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<tr>
<td>Program development fund (Note 4)</td>
<td>5,000</td>
<td>-</td>
</tr>
<tr>
<td>Publications</td>
<td>14,984</td>
<td>25,014</td>
</tr>
<tr>
<td>Rent</td>
<td>16,844</td>
<td>15,916</td>
</tr>
<tr>
<td>Salary and benefits</td>
<td>188,167</td>
<td>184,022</td>
</tr>
<tr>
<td>Systems maintenance</td>
<td>2,138</td>
<td>904</td>
</tr>
<tr>
<td>Travel</td>
<td>34,927</td>
<td>31,624</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>400,824</td>
<td>420,899</td>
</tr>
<tr>
<td><strong>Excess of revenue over expenditures</strong></td>
<td>$137,784</td>
<td>$90,219</td>
</tr>
</tbody>
</table>

See accompanying notes to the financial statements.
## College of Occupational Therapists of British Columbia
### Statement of Financial Position

*June 30* | 2005   | 2004   |
|--------|--------|--------|

### Assets

**Current**

- Cash $175,805 $163,828
- Short term investments (market value $860,032; 2004: $710,000) 860,032 710,000
- Receivables 17,215 17,573
- Prepaids 10,042 4,934

Total assets: $1,063,094 896,335

### Capital assets (Note 3)

- 6,659 3,859

Total assets: $1,069,753 $900,194

### Liabilities

**Current**

- Payables and accruals $27,204 $34,213
- Deferred revenue 209,385 170,601

Total liabilities: $236,589 204,814

### Net Assets

- Unrestricted net assets 216,875 223,103
- Net assets internally restricted (Note 4) 609,630 468,418
- Net assets invested in capital assets 6,659 3,859

Total net assets: $833,164 695,380

Total assets: $1,069,753 $900,194

Committee (Note 6)

On behalf of the Board

[Signatures]

Chair  Vice-Chair

See accompanying notes to the financial statements.
College of Occupational Therapists of British Columbia
Statement of Changes in Net Assets
Year Ended June 30

<table>
<thead>
<tr>
<th>Net assets</th>
<th>Invested in Capital Assets</th>
<th>Unrestricted</th>
<th>Restricted</th>
<th>Total</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Balance, beginning of year</td>
<td>$ 3,859</td>
<td>$ 223,103</td>
<td>$ 468,418</td>
<td>$ 695,380</td>
<td>$ 605,161</td>
</tr>
<tr>
<td>Excess (deficiency) of revenue over expenditures</td>
<td>(3,428)</td>
<td>-</td>
<td>141,212</td>
<td>137,784</td>
<td>90,219</td>
</tr>
<tr>
<td>Investment in capital assets</td>
<td>6,228</td>
<td>(6,228)</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Balance, end of year</td>
<td>$ 6,659</td>
<td>$ 216,875</td>
<td>$ 609,630</td>
<td>$ 833,164</td>
<td>$ 695,380</td>
</tr>
</tbody>
</table>

College of Occupational Therapists of British Columbia
Statement of Cash Flows
Year Ended June 30

Increase (decrease) in cash and cash equivalents

**Operating**
Excess of revenue over expenditures $ 137,784 $ 90,219
Amortization 3,428 10,409
141,212 100,628

Change in non-cash operating working capital (Note 7) 27,025 11,843
168,237 112,471

**Investing**
Purchase of capital assets (6,228) (5,268)

Net increase in cash and cash equivalents 162,009 107,203
Cash and cash equivalents, beginning of year 873,828 766,625
Cash and cash equivalents, end of year $ 1,035,837 $ 873,828

See accompanying notes to the financial statements.

Grant Thornton®
1. Nature of operations

The College of Occupational Therapists of British Columbia was established under the Health Professions Act, effective December 17, 1998. The College's mandate is to serve and protect the public interest by setting standards for entry to practice the profession in British Columbia establishing programs and guidelines to ensure that occupational therapists practice safely, ethically and competently, and investigating complaints raised about registrants’ practice.

For income tax purposes, the College is treated as a not-for-profit organization.

2. Summary of significant accounting policies

Fund accounting

The College of Occupational Therapists of British Columbia follows the deferral fund method of accounting for contributions. The College records its activities in the following funds:

The Unrestricted Fund accounts for the organization’s general operations and overhead.

The Capital Fund includes transactions relating to equipment.

The Internally Restricted Funds include the following:

Inspections, Inquiry and Discipline Funds (previously Investigations and Resolutions Reserve Funds) which are internally restricted funds. They are designated for use in the development and management of the inquiry and discipline process.

Program Development Funds which are internally restricted funds. They are designated for the development and establishment of statutory programs.

Special Projects Funds which are internally restricted funds. They are designated for specific, time limited projects related to board strategic plan / College business plan.

Expenditures from these funds require Board approval.

Revenue recognition

The College follows the deferral method of accounting for contributions. Restricted contributions are recognized as revenue in the appropriate fund in the year in which the related expenses are incurred. Unrestricted contributions are recognized as revenue when received or receivable if the amount to be received can be reasonably estimated and collection is reasonably assured. Application fees are recognized as revenue when received. Annual registration fees are recognized as revenue in the year to which they relate.
2. Summary of significant accounting policies (continued)

Contributed services

The College would not be able to carry out its activities without the services of the many volunteers who donate a considerable number of hours. Because of the difficulty of compiling and valuing these hours, contributed services are not recognized in the financial statements.

Investments

Investments are recorded at the lower of cost or market value.

Cash and cash equivalents

Cash and cash equivalents include cash on hand, balances with banks and short term deposits with original maturities of three months or less.

Capital assets

Purchased capital assets are recorded at cost, and contributed capital assets are recorded at fair value at the date of contribution. Amortization is provided as follows:

- Computer equipment: 3 years, straight line
- Computer software: 2 years, straight line
- Furniture and equipment: 5 years, straight line

Financial instruments

The College’s financial instruments consist of cash, investments, accounts receivable, and accounts payable. Unless otherwise noted, it is management’s opinion that the College is not exposed to significant interest, currency or credit risks arising from these financial instruments. The fair values of these financial instruments approximate their carrying values, unless otherwise noted.

Use of estimates

In preparing the College’s financial statements, management is required to make estimates and assumptions that could affect the reported amounts of assets and liabilities and disclosure of contingent assets and liabilities at the date of the financial statements, and the reported amounts of revenue and expenses during the period. Actual results could differ from those reported.
College of Occupational Therapists of British Columbia
Notes to the Financial Statements
June 30, 2005

3. Capital assets

<table>
<thead>
<tr>
<th></th>
<th>2005</th>
<th>2004</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Cost</td>
<td>Accumulated</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Amortization</td>
</tr>
<tr>
<td>Computer equipment</td>
<td>$28,386</td>
<td>$23,637</td>
</tr>
<tr>
<td>Computer software</td>
<td>6,948</td>
<td>6,948</td>
</tr>
<tr>
<td>Furniture &amp; equipment</td>
<td>13,507</td>
<td>11,597</td>
</tr>
<tr>
<td></td>
<td>$48,841</td>
<td>$42,182</td>
</tr>
</tbody>
</table>

4. Net assets internally restricted

<table>
<thead>
<tr>
<th></th>
<th>Inspections, Inquiry and Discipline Reserve</th>
<th>Program Development Fund</th>
<th>Special Projects Fund</th>
<th>Total 2005</th>
</tr>
</thead>
<tbody>
<tr>
<td>Balance, beginning of year</td>
<td>$193,474</td>
<td>$169,365</td>
<td>$105,579</td>
<td>$468,418</td>
</tr>
<tr>
<td>Allocation of net excess of revenues over expenditures</td>
<td>63,106</td>
<td>63,106</td>
<td>20,000</td>
<td>146,212</td>
</tr>
<tr>
<td>Payments from internally restricted funds (Note 5)</td>
<td>-</td>
<td>(5,000)</td>
<td>-</td>
<td>(5,000)</td>
</tr>
<tr>
<td>Balance, end of year</td>
<td>$256,580</td>
<td>$227,471</td>
<td>$125,579</td>
<td>$609,630</td>
</tr>
</tbody>
</table>

These internally restricted amounts are not available for other purposes without approval of the board of directors.

5. Payments from internally restricted funds

In the current year, the College made payments totalling $5,000 out of the internally restricted Program Development Fund to the Association of Canadian Occupational Therapy Regulatory Organizations (ACOTRO) for the Evaluation of Occupational Therapy Substantial Equivalency Using a Competency Framework project.
6. Commitment

The College has entered into an agreement to lease its premises until November 2005. The monthly rent is $1,381. It is the intention of the College to renew this lease. Minimum rent payable for the next year is $6,905.

7. Supplemental cash flow information

<table>
<thead>
<tr>
<th></th>
<th>2005</th>
<th>2004</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change in non-cash operating working capital:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Receivables</td>
<td>$ 358</td>
<td>$ (1,664)</td>
</tr>
<tr>
<td>Prepaid</td>
<td>(5,108)</td>
<td>743</td>
</tr>
<tr>
<td>Payables and accruals</td>
<td>(7,009)</td>
<td>16,948</td>
</tr>
<tr>
<td>Deferred revenue</td>
<td>38,784</td>
<td>(4,184)</td>
</tr>
<tr>
<td></td>
<td>$ 27,025</td>
<td>$ 11,843</td>
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<tr>
<td>Interest received</td>
<td>$ 18,692</td>
<td>$ 18,966</td>
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</table>