



# Making the Continuing Competence Program (CCP) “Fit” For You

Examples of CCP submissions for unique practice areas and settings

This document has been created in response to requests from ACOT registrants who reported needing clarity and specific examples of what to include in a Continuing Competence Program (CCP) submission each year. Registrants have expressed frustration with trying to apply the Standards of Practice (SoP) and Code of Ethics (CoE) indicators to their practice area/practice setting, particularly if they work in non-clinical/non-traditional roles. The examples offered in this document will attempt to demonstrate how you can make the CCP “fit” for your practice area/setting, regardless of your role.

Additional CCP resource materials have been developed to support registrants in learning more about the CCP, how to navigate the online platform and examples of what to include in each of the required components. Check out the [CCP Resources](#) page on the ACOT website for these resources.

If any questions remain after reviewing this document or any of the other resource materials or, if you have feedback for us on the content in any of the materials, feel free to call 780.436.8381 or email to [info@acot.ca](mailto:info@acot.ca). This document and the other CCP resource materials will be updated as required to meet registrant needs.

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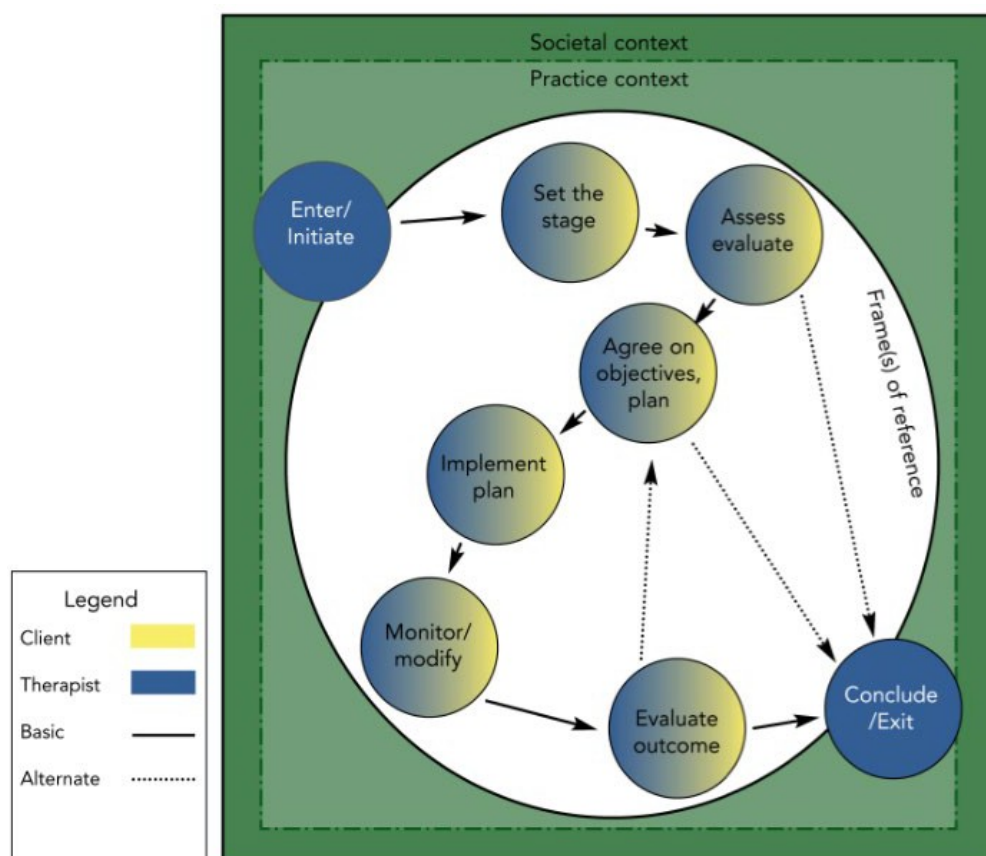
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## 1. Applying the Standards of Practice and Code of Ethics to Your Practice

### a. Who is your “client”?

ACOT has heard from many OTs registered in Alberta that they find it difficult to relate the [Standards of Practice](#) (SoP) and [Code of Ethics](#) (CoE) to their work if they are practicing in non-clinical or non-traditional roles. Alternately, just as many frontline clinicians report that the SoP and CoE are too abstract, high-level or theoretical to reflect the realities of front-line clinical practice. Either way, registrants are reporting they are frustrated and have a sense of needing to force, finesse or tailor their real-life practice/work goals to fit and align with ACOT’s Standards of Practice and Code of Ethics.

ACOT’s Standards of Practice and the indicators within them align closely with the Canadian Practice Process Framework found in *Enabling Occupation II: Advancing an Occupational Therapy Vision for Health, Well-being, & Justice Through Occupation* (as cited in the figure below).



Polatajko, H. J., Craik, J., Davis, J., & Townsend, E. A. (2007). Canadian Practice Process Framework. In E. A. Townsend and H. J. Polatajko, *Enabling occupation II: Advancing an occupational therapy vision for health, well-being, & justice through occupation*. p. 233 Ottawa, ON: CAOT Publications ACE.

ACOT recognizes that occupational therapists work in five major roles – practitioner (clinician), educator, consultant, researcher, administrator and the recipient of occupational therapy services, the “client”, may be an individual, group, organization, system, or combination of these.” (SoP p.1)

OTs practicing clinically with individuals can often see how the work they are doing with their clients aligns with this process and thus ACOT’s Standards of Practice. For OTs that do not practice clinically, it is sometimes challenging to recognize the client in their work and/or how work they are doing is still OT practice - defined as the “art and science of enabling engagement in everyday living through occupation” (Townsend & Polatajko, 2007, p.372). Even OTs that do practice clinically can have “clients” beyond the clients or families they assess and treat. Some examples of OT roles and what could be considered OT practice in those roles are offered in the following table:

Role	Example of OT practice	Potential “client(s)”
Front line team/program lead	e.g. determining/ prioritizing service allocation or waitlist management	The waitlist that needs to be reduced
	e.g. determining and ensuring knowledge and skill level of professional/support personnel	Staff under the therapist’s supervision
Private Practice (solo or group/clinic)	e.g. expansion of private practice for long-term (and full-time) viability e.g. advertising and marketing practice	The business itself; the OT as an owner/operator
Consultant OT	e.g. providing consultant services to a school board, an early childhood services provider or other private organization as an employee or contractor	The agency itself or the teachers/staff the agency employs; the program an OT has been engaged to develop or offer feedback on
Local, regional, or provincial level professional/clinical practice support	e.g. researching and supporting implementation of best practice of OT/allied health	OTs/other health providers in the local, regional or provincial area
Program Manager/ Director/ Administrator/ Other non-clinical leadership role	e.g. within AHS, government or an agency/organization overseeing or supporting operations/service delivery, program development, quality monitoring/quality improvement, etc.	The program/project being overseen/managed; the recipients of the program services

Government/ Public policy/ Operational policy	e.g. strategic or operational policy development in health, social, or community services within a political/ economic environment	Federal and/or provincial health or social systems
Researcher	e.g. gathering evidence to support/evolve OT practice or any other area of knowledge	The gap in knowledge that needs to be filled; the beneficiaries of the knowledge acquired from the research (e.g. OTs, people with certain health conditions or functional limitations, policy/decision makers); the research team
Educator/ Knowledge translator	e.g. educating staff/colleagues/ post- secondary students; conveying evidence or knowledge to others	The recipients of the education or knowledge transfer

Reframing who one's client is should help to make the Standards of Practice and Code of Ethics more relatable to the numerous and diverse areas that OTs practice in Alberta.

## 2. CCP Submission Examples

**Please note: these examples are fictitious.** However, they are reflective of conversations with OTs in the various roles listed above. Also, with the diversity of OT practice in Alberta, it is nearly impossible to provide an example for every practice area or practice setting, hopefully these examples will give you a sense of how to select relevant SoP/CoE indicators to set goals for in your CCP Learning Plan and what type of content you should include in each of the Learning Plan sections.

The examples offered in this document meet the criteria for an acceptable submission according to the **CCP Submission Rubric**. The Rubric can be accessed, along with other resources prepared to support OTs in completing their CCP Learning Plans, from the [CCP Resources](#) page of the ACOT website.

Additional examples of content to include in each section of your CCP Learning Plan can be found in the **CCP Step-by-Step Guide** and the **2020-2021 CCP Information Session: Examples to Accompany Slide Deck**.

If you have any issues with the content included in the examples below or would like to offer examples from your own CCP submission(s) to contribute to this collection, please contact Angela Sekulic, Director Policy and Practice at [angela.sekulic@acot.ca](mailto:angela.sekulic@acot.ca).

a. Example 1 - Frontline Team/Program Lead

Area of focus

**9.3 Evaluate the services provided and his/her/their occupational therapy practice.**

\* Please reflect on why you have selected this as an area of focus for this registration year including how you anticipate your competence (knowledge, skills, attitudes and judgement) in the selected area of focus will be enhanced (3000 character limit)

The number of clients attending the program in which I work continues to increase and we are faced with having to prioritize services in order to ensure that clients that actually need our services can receive them in a timely fashion. I have offered to lead a project to evaluate our current service delivery model and come up with recommendations for how we can more clearly define what services we can offer and find efficiencies in scheduling and use of support personnel in service delivery so that we can meet the increase in demand.

\* Write a goal statement (e.g. SMART – specific, measurable, achievable, realistic, tangible) relating to the outcome(s) you hope to attain in this area of focus (Limit 3000 characters).

I will undertake an evaluation of our program using data from the past 3 years (e.g. client demographic/attendance data, occupational performance issues identified, services delivered, outcomes attained) and bring forward recommendations to the program manager regarding alternate service delivery methods/processes by September of this year.

\* The key learning activities I anticipate completing to achieve this goal include: (Recommend limiting to three activities)

- ☐ Academic study
- ☐ Participation in learning sessions (conferences, workshops, in-services, webinars, etc.)
- ☒ Conducting a survey/review/evaluation of my service/program
- ☐ Find a mentor or coach/job shadowing
- ☐ Consultation or networking with colleagues or others
- ☐ Research
- ☐ Review of materials (reading articles, journals, text books, podcasts, etc.)
- ☐ Self-study/study group
- ☐ Prepare materials or presentations
- ☐ Teaching/mentoring students, peers, other colleagues
- ☐ Volunteer with College/professional association/work committees/other volunteer activities related to the practice of OT
- ☐ Other

The three sections shown above are those you are expected to complete for the upcoming year when you are renewing your registration/practice permit during the Jan 1-Feb 28/29 renewal period.

## LEARNING ACTIVITY RECORD

- Click the add button below to record your activities for this registration year
- Only list activities which have been completed in this registration year

Add
Click here to add a new Learning Record

\* Activity

Conducting a survey/review/evaluation of my service/program

\* Description

Collection and analysis of program data

\* Date completed

2021-01-29

\* Duration (hours)

40

\* Related standard of practice or code of ethics indicator

9.3

Indicator


Evaluate the services provided and his/her/their occupational therapy practice.

\* Summary of learning and impact on practice

Although I initially thought I could have the analysis of our historical program data gathered and analyzed by September, I needed until January to complete due to competing workplace demands (my manager approved the extension). I also decided to only gather and collate 2 years of data given that getting the third year of data would have meant pulling paper records which would have caused additional delays (we switched from paper to electronic records two years ago). I've attached the (deidentified) summary of the recommendations I put forward to my manager based on my analysis of the data.

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recommendations to address increased client demand for our program

Although uploading a supporting document to a Learning Record isn't always required (given that a Learning Record can serve as a competence portfolio document on its own), in this example, including the summary of program evaluation recommendations augments the content in the Learning Record. Note that it is not necessary to include the data or the analysis of that data.

This example also highlights that plans indicated in a goal statement written prior to the start of the registration year can and do change. You can either rewrite a goal statement (or even select a different indicator by editing your Self-Assessment) or do as is shown here in this example – indicate what has changed in a Learning Record (i.e. timeframe for goal completion and the timespan of data collection).

### Year End Reflection

\* Please reflect on how these learning activities have changed or benefitted your practice. A reflection may include, but is not limited to, the following:

- how you are applying what you have learned from the various activities in your practice
- why completing these activities was important for your professional development and/or how it has evolved your practice

(Note: to be completed after the activities for the area of focus are completed or at the end of the registration year at the time of registration renewal) (Limit 3000 characters)

This was a really good experience for me to undertake this program evaluation in a more formal way. In the past, I may have presumed I knew what steps to take to address the increased client demand or I may have accepted that a program waitlist was par for the course. Taking a more formal approach helped me to discover solutions that I might not have otherwise thought of. Having a more formal evaluation report for my manager to take to our organization's leadership team also helped tremendously in getting the recommendations approved. I am excited to implement the program changes in the coming year (one of the changes relates to optimizing the use of our therapist assistants, so I'll choose an indicator that ties into that for next year's Learning Plan - maybe indicator 1.4?)

The content in the year-end reflection (the text box that shows up when you select the “completed” option), expands on and doesn’t duplicate the content documented in the Learning Record(s) attached to the goal.



b. Example 2 - Private practice

Area of focus

**9.1 Maintain appropriate management structures and organizational structures and processes for his/her/their practice.**

\* Please reflect on why you have selected this as an area of focus for this registration year including how you anticipate your competence (knowledge, skills, attitudes and judgement) in the selected area of focus will be enhanced (3000 character limit)

With the changes in funding for schools and early childhood services, I am going to focus part of my attention this year on setting up a private practice so that I am prepared in case of FTE reduction or job loss.

\* Write a goal statement (e.g. SMART – specific, measurable, achievable, realistic, tangible) relating to the outcome(s) you hope to attain in this area of focus (Limit 3000 characters).

By June of this year, I will gather and review information from the following sources 1. the guidance documents prepared by ACOT for OTs in Private Practice; 2. an OT listed in in SAOT's OT Private Practice listing that offers services in a similar area of practice; 3. a Business Development Consultant. I will incorporate the information gathered into a business case to submit to my municipality that is offering start-up grants for small businesses.

\* The key learning activities I anticipate completing to achieve this goal include: (Recommend limiting to three activities)

- ☐ Academic study
- ☐ Participation in learning sessions (conferences, workshops, in-services, webinars, etc.)
- ☐ Conducting a survey/review/evaluation of my service/program
- ☐ Find a mentor or coach/job shadowing
- ☒ Consultation or networking with colleagues or others
- ☐ Research
- ☒ Review of materials (reading articles, journals, text books, podcasts, etc.)
- ☐ Self-study/study group
- ☐ Prepare materials or presentations
- ☐ Teaching/mentoring students, peers, other colleagues
- ☐ Volunteer with College/professional association/work committees/other volunteer activities related to the practice of OT
- ☐ Other

## Example 2 - Learning Record 1

### LEARNING ACTIVITY RECORD

- Click the add button below to record your activities for this registration year
- Only list activities which have been completed in this registration year

**Add** Click here to add a new Learning Record

\* Activity

Review of materials (reading articles, journals, text books, podcasts, etc.)

\* Description

Review of ACOT practice guidance resources

\* Date completed

2020-04-01

\* Duration (hours)

10

\* Related standard of practice  
or code of ethics indicator

9.1

Indicator

**Maintain appropriate management structures and organizational structures and processes for his/her/their practice.**


\* Summary of learning and impact on practice

I reviewed the following documents from the ACOT website: Legislative and Regulatory Considerations for Private Practice (Mar 15), Practice FAQs: Private Practice (Mar 15), Standards for Documentation (March 20), Electronic Communications with Clients (March 22), Information Privacy and Disclosure Legislation ((March 22), and OT Service Delivery Using Virtual Means (March 25). Wow, there is so much more to operating a private practice than I ever considered before. I have so many questions for the OT colleague that has agreed to mentor me through the start-up of my practice.



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## Example 2 - Learning Record 2



\* Activity

Find a mentor or coach/job shadowing

\* Description

Finding an OT in a similar area of practice

\* Date completed

2020-05-15

\* Duration (hours)

8

\* Related standard of practice or code of ethics indicator

9.1


Indicator

**Maintain appropriate management structures and organizational structures and processes for his/her/their practice.**

\* Summary of learning and impact on practice

I am so glad I reached out to someone already in private practice as I was so overwhelmed after reading about the various private practice requirements that I was beginning to doubt my decision. The OT (we spoke on May 2) has offered to be a mentor and pointed me in the direction of an electronic record keeping system that will address both the business and client side of things. I have booked a demo with the system developer next week – according to my mentor, this system will help address my record security and retention requirements and will also allow secure client (parent/guardian) access to records for ease and security of communication.

May 15 update - I met with the record keeping system developer and my mentor again last week. I have a quote for the system that I will incorporate into my business case and my mentor gave me sample forms (consent and assessment/treatment reporting forms) that I will be able to refer to when customizing the client side of the system.

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## Example 2 - Learning Record 3

**\* Activity**

Consultation or networking with colleagues or others

**\* Description**

Meeting with Business Consultant

**\* Date completed**

2020-06-13

**\* Duration (hours)**

4

**\* Related standard of practice or code of ethics indicator**

9.1

**Indicator**

**Maintain appropriate management structures and organizational structures and processes for his/her/their practice.**

**\* Summary of learning and impact on practice**

The business consultant I engaged was recommended to me by an SLP colleague (who I hope to be able to collaborate with in the case any of my clients need a multidisciplinary approach). It was well worth the investment to engage this consultant as I have more insight and resources to tap into for the legal/business side of things. For example, the consultant reviewed the pros and cons of formally incorporating and/or registering my business both federally and provincially. So much to think about - I'm going to take a few months to think about it before making a decision.

Click to upload a supporting document

Note that none of the three Learning Records have supporting documents attached – the Learning Records themselves have enough content to function as portfolio documents.

The goal completion status content for this example (see next page) ties together the reflection content from the three Learning Records and highlights at least one way the new learning is being applied or how the person's practice in this area has evolved.

### Year End Reflection

\* Please reflect on why you have selected this as an area of focus for this registration year including how you anticipate your competence (knowledge, skills, attitudes and judgement) in the selected area of focus will be enhanced (3000 character limit)

I did complete the activities outlined to achieve my goal by the end of June although I did take until August to create my business case/grant application. As it turns out, I didn't get the grant :( as my proposed business didn't meet all of the requirements (not innovative enough they tell me...) but it was a good experience completing the application as I feel really prepared to proceed now. I did apply and was approved for a low-interest small business loan through my bank which helped me with the costs of purchasing a new computer and smartphone and the electronic record keeping system license.

The biggest takeaway from this experience is an appreciation of what my employer (I am still employed - although things could change again so I'm glad to be prepared) has to do to ensure that their practices align not only with the legislation they operate under (the Education Act, the Student Records Regulation, etc.) but also with the Standards of Practice and Code of Ethics of each of the health professionals they employ as well. I was able to flag one of my concerns with my employer (i.e. access to OT records by school staff and who can and should see what) that I hadn't really thought about until I reviewed the requirements the Information Privacy and Disclosure guideline.

c. Example 3 – Consultant

Area of focus

2.4 Identify the roles and responsibilities of the individuals involved in the request for service (client, referral source, and the therapist.)

\* Please reflect on why you have selected this as an area of focus for this registration year including how you anticipate your competence (knowledge, skills, attitudes and judgement) in the selected area of focus will be enhanced (3000 character limit)

I am hired by the local school board as a consultant where my clients are actually the teachers and support staff for each of the classrooms/schools. Individual students also become clients if an individualized assessment/treatment plan is required. The constant challenge for me and my OT/allied health colleagues is that the teachers/EAs need coaching on when an individualized assessment is actually required. It goes both ways, sometimes they ask for an assessment before they have tried universal strategies, other times they use strategies that worked for one student with another student without the need/safety being properly assessed by a professional first.

Working together with my allied health colleagues and in collaboration with other school boards, my team and I will develop an allied health referral decision tool and tool interpretation guide for the teachers in our school board.

\* Write a goal statement (e.g. SMART – specific, measurable, achievable, realistic, tangible) relating to the outcome(s) you hope to attain in this area of focus (Limit 3000 characters).

Working together with my allied health colleagues and in collaboration with other school boards, my team and I will develop an allied health referral decision tool/tool interpretation guide for the teachers in our school board (NOTE: goal carried forward from last year; refer to last year's Learning Plan/Learning Records for details of activities completed to date).

\* The key learning activities I anticipate completing to achieve this goal include: (Recommend limiting to three activities)

- ☐ Academic study
- ☐ Participation in learning sessions (conferences, workshops, in-services, webinars, etc.)
- ☐ Conducting a survey/review/evaluation of my service/program
- ☐ Find a mentor or coach/job shadowing
- ☐ Consultation or networking with colleagues or others
- ☐ Research
- ☐ Review of materials (reading articles, journals, text books, podcasts, etc.)
- ☐ Self-study/study group
- ☒ Prepare materials or presentations
- ☐ Teaching/mentoring students, peers, other colleagues
- ☐ Volunteer with College/professional association/work committees/other volunteer activities related to the practice of OT
- ☐ Other

This is an example of how a goal can be carried forward (ongoing) from a previous year to be completed. The initial reflection content and goal statement can be copied and pasted from the previous year's submission.

## LEARNING ACTIVITY RECORD

- Click the add button below to record your activities for this registration year
- Only list activities which have been completed in this registration year

**Add** Click here to add a new Learning Record

\* Activity

Prepare materials or presentations

\* Description

Referral Decision Tool training sessions for teachers

\* Date completed

2020-10-30

\* Duration (hours)

12

\* Related standard of practice  
or code of ethics indicator

2.4

Indicator

Identify the roles and responsibilities of the individuals involved in the request for service (client, referral source, and the therapist.)

\* Summary of learning and impact on practice

Initial training sessions were conducted at a couple of schools in April/May and we completed the remainder of the sessions end of Sept/October. We were able to incorporate the feedback from the teachers at the initial schools into the tool/training sessions conducted at the start of the new school year.



Click to upload a supporting document

\* Goal completion status

Completed

### Year End Reflection

\* Please reflect on why you have selected this as an area of focus for this registration year including how you anticipate your competence (knowledge, skills, attitudes and judgement) in the selected area of focus will be enhanced (3000 character limit)

Even though there is still some post-implementation evaluation work to be done to follow-up on the impact of the new Referral Decision Tool, I am going to mark this goal as completed. Preliminary feedback from teachers is that they have a better understanding of what strategies they can and should employ before referring students to members of the allied health team. It's still not perfect, but it's getting better and the allied team and the school administration are grateful to have a more formalized process in place. I know it has saved me a considerable amount of time and frustration; I can now focus on the kiddos that I really need to see and for the reasons that my OT expertise is best suited for.

With the ongoing option having been used in the previous year, it is expected that the goal would be completed this year

d. Example 4 - Practice lead

Area of focus

**1.4 Be responsible for the occupational therapy services provided by oneself and demonstrate accountability for services provided by other personnel who are under the therapist's supervision.**

\* Please reflect on why you have selected this as an area of focus for this registration year including how you anticipate your competence (knowledge, skills, attitudes and judgement) in the selected area of focus will be enhanced (3000 character limit)

In my role as clinical practice lead for a multidisciplinary team of both regulated and unregulated health care providers, I am responsible for determining the knowledge and skill each team member has/needs in order to fulfill the roles outlined in our program description. Our program is shifting to a hybrid virtual/in-person service delivery model in response to the positive feedback from clients and staff when we incorporated virtual care as a mode of service delivery during the pandemic. I am responsible for formalizing the training process for virtual care delivery to ensure that all new and existing staff who are involved with virtual care delivery acquire and maintain the competency to do so.

\* Write a goal statement (e.g. SMART – specific, measurable, achievable, realistic, tangible) relating to the outcome(s) you hope to attain in this area of focus (Limit 3000 characters).

By July of this year, I will develop a virtual care competency acquisition checklist that has both generic competencies applicable to all members of my team as well as discipline-specific competencies (as applicable) for the regulated professionals. (Note: the July timeframe aligns with what I specified in my performance agreement for my employer).

\* The key learning activities I anticipate completing to achieve this goal include: (Recommend limiting to three activities)

- ☐ Academic study
- ☐ Participation in learning sessions (conferences, workshops, in-services, webinars, etc.)
- ☐ Conducting a survey/review/evaluation of my service/program
- ☐ Find a mentor or coach/job shadowing
- ☒ Consultation or networking with colleagues or others
- ☐ Research
- ☐ Review of materials (reading articles, journals, text books, podcasts, etc.)
- ☐ Self-study/study group
- ☒ Prepare materials or presentations
- ☒ Teaching/mentoring students, peers, other colleagues
- ☐ Volunteer with College/professional association/work committees/other volunteer activities related to the practice of OT
- ☐ Other



## Example 4 - Learning Record 1

Add
Click here to add a new Learning Record

\* Activity

Consultation or networking with colleagues or others

\* Description

Request for sharing of resources prepared by colleagues in other organizations

\* Date completed

2021-07-30

\* Duration (hours)

5

\* Related standard of practice or code of ethics indicator

1.4

Indicator

Be responsible for the occupational therapy services provided by oneself and demonstrate accountability for services provided by other personnel who are under the therapist's supervision.

\* Summary of learning and impact on practice

I reached out to several of my colleagues who work in other organizations within Alberta and across Canada to see if they had done any work in this area of skill development for virtual care delivery; some had and other's hadn't. I got permission from my supervisor to strike a cross-organization working group to pool resources and efforts in the development of a virtual care competency checklist we could all use. I spent quite a bit more time than the 5hrs indicated above - that is the time spent in working group meetings only. I've attached the basic checklist that the working group created. Each of us will customize to our unique programs/practice settings.

Click to upload a supporting document

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virtual care competency checklist

## Example 4 - Learning Record 2

\* Activity

Teaching/mentoring students, peers, other colleagues

\* Description

Staff training and competency assessment

\* Date completed

2021-08-31

\* Duration (hours)

10

\* Related standard of practice or code of ethics indicator

1.4

Indicator

Be responsible for the occupational therapy services provided by oneself and demonstrate accountability for services provided by other personnel who are under the therapist's supervision.

\* Summary of learning and impact on practice

I worked together with my team to identify which training resources would be required to support new and existing staff to acquire the virtual care competencies outlined in the checklist. I compiled the resources into a package for new staff to review during their orientation and existing staff to review as needed.

Click to upload a supporting document

Year End Reflection

\* Please reflect on why you have selected this as an area of focus for this registration year including how you anticipate your competence (knowledge, skills, attitudes and judgement) in the selected area of focus will be enhanced (3000 character limit)

It took me a bit longer to complete this goal than originally planned because I didn't anticipate the creation of the working group. The collaboration that came out of the working group was so worth it though - both myself and my team have created lasting networks. Our program may even be part of a national research study that will be comparing client and health care worker satisfaction with virtual care delivery compared to in-person services.

There is no need to repeat the content from the Learning Records in the year-end reflection and it is OK if the timeframes for goal completion change due to circumstances.

e. Example 5 - Program Manager/Director/Administrator

Area of focus

**4.2 Demonstrate consideration of how occupational performance components, and environmental elements are contributing to occupational performance issues.**

\* Please reflect on why you have selected this as an area of focus for this registration year including how you anticipate your competence (knowledge, skills, attitudes and judgement) in the selected area of focus will be enhanced (3000 character limit)

In my Director role in my organization, I am responsible for directing/leading projects targeted at health system evaluation and improvement rather than clinical service delivery. At times I wonder if what I am doing is still considered OT practice but in conversations with other OTs in leadership roles, I can see that how I assess/address health system quality issues is very similar to how a clinical OT would assess/treat an individual client's occupational performance issues. I would like to be more attentive to these parallels/similarities in my work this year so that I can remain connected to the OT profession.

\* Write a goal statement (e.g. SMART – specific, measurable, achievable, realistic, tangible) relating to the outcome(s) you hope to attain in this area of focus (Limit 3000 characters).

I will carve out time to review and refresh my knowledge of the various occupational therapy models and frameworks and draw parallels to the quality improvement processes used by my organization. I will offer to present my learnings to the other OTs in leadership roles by the end of the year (we have quarterly lunchtime meet-ups for support and exchange of ideas).

\* The key learning activities I anticipate completing to achieve this goal include: (Recommend limiting to three activities)

- ☐ Academic study
- ☐ Participation in learning sessions (conferences, workshops, in-services, webinars, etc.)
- ☐ Conducting a survey/review/evaluation of my service/program
- ☐ Find a mentor or coach/job shadowing
- ☒ Consultation or networking with colleagues or others
- ☐ Research
- ☒ Review of materials (reading articles, journals, text books, podcasts, etc.)
- ☐ Self-study/study group
- ☐ Prepare materials or presentations
- ☐ Teaching/mentoring students, peers, other colleagues
- ☐ Volunteer with College/professional association/work committees/other volunteer activities related to the practice of OT
- ☐ Other

Although, use of non-identifying terms such as “my organization” in this example is for purposes of generalizability, you can also de-identify any content included in your CCP submission if there is a concern about confidentiality.

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f. Example 6 - Government/Public Policy

Area of focus

8.1 Identify the key participants with whom communication is important and necessary and communicate with them in a manner that promotes a shared understanding.

\* Please reflect on why you have selected this as an area of focus for this registration year including how you anticipate your competence (knowledge, skills, attitudes and judgement) in the selected area of focus will be enhanced (3000 character limit)

In my senior policy analyst role with the Government of Alberta (GoA), my main responsibility is to fully understand and draft communications pertaining to issues brought to and identified by my Ministry. These communications vary from responses to inquiries from the public, to briefing notes and other reports/policy documents for Deputy Minister/Minister or other Members of the Legislative Assembly. Given the difference in the needs of these recipients, I have to take care and pay attention to adjusting my communication style to the needs of each recipient.

\* Write a goal statement (e.g. SMART – specific, measurable, achievable, realistic, tangible) relating to the outcome(s) you hope to attain in this area of focus (Limit 3000 characters).

I will seek and incorporate feedback from my Executive Director (ED) regarding the quality of the communications I prepare for both the public and senior management at the beginning of the year and seek follow-up feedback after 6 months (Note: this is also a goal in my performance agreement – my manager has allowed me to adjust my performance review period to align with the ACOT registration year which is so helpful)

\* The key learning activities I anticipate completing to achieve this goal include: (Recommend limiting to three activities)

- ☐ Academic study
- ☐ Participation in learning sessions (conferences, workshops, in-services, webinars, etc.)
- ☐ Conducting a survey/review/evaluation of my service/program
- ☒ Find a mentor or coach/job shadowing
- ☐ Consultation or networking with colleagues or others
- ☐ Research
- ☐ Review of materials (reading articles, journals, text books, podcasts, etc.)
- ☐ Self-study/study group
- ☐ Prepare materials or presentations
- ☐ Teaching/mentoring students, peers, other colleagues
- ☐ Volunteer with College/professional association/work committees/other volunteer activities related to the practice of OT
- ☐ Other

Goals don't have to be lofty, complex or span the registration year – goals that simple and achievable in a shorter timeframe are perfectly acceptable

This same indicator could be used by an OT in a management role in government as offering feedback and bringing a strategic viewpoint to policy documents is an important part of government/operational policy development work.

## LEARNING ACTIVITY RECORD

- Click the add button below to record your activities for this registration year
- Only list activities which have been completed in this registration year

**Add** Click here to add a new Learning Record

### \* Activity

Find a mentor or coach/job shadowing

### \* Description

Feedback on communication

### \* Date completed

2021-08-31

### \* Duration (hours)

1

### \* Related standard of practice or code of ethics indicator

8.1

### Indicator

Identify the key participants with whom communication is important and necessary and communicate with them in a manner that promotes a shared understanding.

### \* Summary of learning and impact on practice

I found a rubric created by the GoA writing services group for my ED to use to rate the quality of two documents that I drafted (one response letter to a public inquiry to the Minister and one briefing note for my Deputy Minister). I used the same rubric again with examples of similar types of documents prior to my mid-year review at the beginning of August. I have attached the rubric with the pre-post comments from my ED.



Click to upload a supporting document



Click here to delete the uploaded document



pre-post feedback on communication

### \* Goal completion status

Completed

## Year End Reflection

\* Please reflect on why you have selected this as an area of focus for this registration year including how you anticipate your competence (knowledge, skills, attitudes and judgement) in the selected area of focus will be enhanced (3000 character limit)

I am most proud of my ED's comments on my thorough analysis of the issues I am drafting communications for – I attribute that thoroughness to my "thinking like an OT" and undertaking a fulsome assessment of the (occupational performance = person, environment, occupation) issues prior to drafting my response or proposing recommendations (interventions).

Although finessing one's communication skills is an ongoing/lifelong exercise, this example shows how a person can set a goal that is targeted and achievable.



g. Example 7 – Educator

Area of focus

**3.1 Gather and analyze pertinent information to assist in selecting an approach to service.** This information is integrated with the therapist's previous experience, established professional knowledge base, and principles and models currently used in Canadian practice, in order to determine the most appropriate approach for each client.

\* Please reflect on why you have selected this as an area of focus for this registration year including how you anticipate your competence (knowledge, skills, attitudes and judgement) in the selected area of focus will be enhanced (3000 character limit)

The students of the post-secondary institution I teach at are my clients. With the release of the new OT Core Competencies (CORECOM) expected in March 2021, our teaching team needs to seek approval from the department chair to undertake a curriculum review/update to ensure our curriculum aligns with the new competencies (and eventually accreditation standards for post-secondary programs). Once the competencies are released, I/my colleagues will review and outline what curriculum changes will be required.

\* Write a goal statement (e.g. SMART – specific, measurable, achievable, realistic, tangible) relating to the outcome(s) you hope to attain in this area of focus (Limit 3000 characters).

By the beginning of May, I will take the lead to compile our input into a summary report for the department chair's consideration and approval.

\* The key learning activities I anticipate completing to achieve this goal include: (Recommend limiting to three activities)

- ☐ Academic study
- ☐ Participation in learning sessions (conferences, workshops, in-services, webinars, etc.)
- ☐ Conducting a survey/review/evaluation of my service/program
- ☐ Find a mentor or coach/job shadowing
- ☐ Consultation or networking with colleagues or others
- ☐ Research
- ☒ Review of materials (reading articles, journals, text books, podcasts, etc.)
- ☐ Self-study/study group
- ☒ Prepare materials or presentations
- ☐ Teaching/mentoring students, peers, other colleagues
- ☐ Volunteer with College/professional association/work committees/other volunteer activities related to the practice of OT
- ☐ Other

Although, use of non-identifying terms such as “my post-secondary institution” in this example is for purposes of generalizability, you can also de-identify any content you are including in your CCP submission if there is a concern about confidentiality.





\* Activity

Prepare materials or presentations

\* Description

Summary Report of CORECOM impacts on current curriculum

\* Date completed

yyyy-mm-dd

\* Duration (hours)

5

\* Related standard of practice or code of ethics indicator

3.1

Indicator

Gather and analyze pertinent information to assist in selecting an approach to service. This information is integrated with the therapist's previous experience, established professional knowledge base, and principles and models currently used in Canadian practice, in order to determine the most appropriate approach for each client.

\* Summary of learning and impact on practice

The summary report prepared for the department chair itemized the content changes the teaching team identified as needing to be made and offered two different timelines for completion based on whether we are approved for additional resources (i.e. we will either require 1. additional FTE; 2. Existing staff complete curriculum updates as time/workload permits). Thankfully the new competencies included areas that we have already planned to incorporate into our curriculum so there will be less work to do overall.



Click to upload a supporting document

It is acceptable to include one Learning Record to address two learning activities (i.e. review of materials and preparation of materials).

\* Goal completion status

Completed

Year End Reflection

\* Please reflect on why you have selected this as an area of focus for this registration year including how you anticipate your competence (knowledge, skills, attitudes and judgement) in the selected area of focus will be enhanced (3000 character limit)

Feedback on the report was positive; the department chair and institution administration appreciated that the required changes were clearly outlined and that different options for the timing of the curriculum updates based on funding/staffing resources were offered. Unfortunately, we didn't receive administration approval for a temporary increase in FTE so we will have to do the remaining curriculum updates in stages as each of us has time. Although not ideal, it does offer us more time to collaborate with our colleagues across the country.

h. Example 8 – Researcher

Area of focus

**1.4 Be responsible for the occupational therapy services provided by oneself and demonstrate accountability for services provided by other personnel who are under the therapist's supervision.**

\* Please reflect on why you have selected this as an area of focus for this registration year including how you anticipate your competence (knowledge, skills, attitudes and judgement) in the selected area of focus will be enhanced (3000 character limit)

In my role as a lead for two major research projects both the projects and the research teams I am responsible for supervising are my clients. Although the research projects are related, having the second project added to my scope of responsibility has been proving more challenging than I had anticipated given that I have twice the number of research assistants/grad students to supervise along with additional progress reporting requirements for the various grant funding agencies. I feel pulled in so many directions and I worry that the team members won't get the support that they need and/or we will get behind on our progress reporting.

\* Write a goal statement (e.g. SMART – specific, measurable, achievable, realistic, tangible) relating to the outcome(s) you hope to attain in this area of focus (Limit 3000 characters).


Within two months, I will devise and implement a more formal process for checking in with my research teams and tracking/reporting project progress

\* The key learning activities I anticipate completing to achieve this goal include: (Recommend limiting to three activities)

- ☐ Academic study
- ☐ Participation in learning sessions (conferences, workshops, in-services, webinars, etc.)
- ☐ Conducting a survey/review/evaluation of my service/program
- ☐ Find a mentor or coach/job shadowing
- ☐ Consultation or networking with colleagues or others
- ☐ Research
- ☐ Review of materials (reading articles, journals, text books, podcasts, etc.)
- ☐ Self-study/study group
- ☐ Prepare materials or presentations
- ☐ Teaching/mentoring students, peers, other colleagues
- ☐ Volunteer with College/professional association/work committees/other volunteer activities related to the practice of OT
- ☒ Other

\* Please describe other activity

Development of a team communication strategy



\* Activity

Other

\* Description

Creation of weekly staff/team check-in tool

\* Date completed

2021-05-31

\* Duration (hours)

2

\* Related standard of practice or code of ethics indicator


1.4

Indicator

Be responsible for the occupational therapy services provided by oneself and demonstrate accountability for services provided by other personnel who are under the therapist's supervision.

\* Summary of learning and impact on practice

I created a survey tool for the members of my research team to quickly rate each week the status of their research tasks, whether they have any issues they need to discuss with me/the team, and how urgently that discussion needs to happen. I've also created a progress reporting template that the members of each project contribute to so that I don't have to create two reports myself each month.

 Click to upload a supporting document

\* Goal completion status

Completed

**Year End Reflection**

\* Please reflect on why you have selected this as an area of focus for this registration year including how you anticipate your competence (knowledge, skills, attitudes and judgement) in the selected area of focus will be enhanced (3000 character limit)

The new communication strategies are working well. Feedback from the team members was that the weekly "pulse check" was too often so we switched to every 2 weeks. Having to only finesse the monthly project update reports rather than completing them from scratch myself has been a great timesaver for me and the grad students on the team report that they appreciate doing it because it keeps them on top of reporting requirements for their own thesis supervisors. I feel much more on top of things and have also achieved a better work-life balance as a bonus.

If you have any issues with the content included in the examples or would like to offer examples from your own CCP submission(s) to contribute to this collection, please contact Angela Sekulic, Director Policy and Practice at [angela.sekulic@acot.ca](mailto:angela.sekulic@acot.ca).