

Everyday Advocacy Decision Guide

As occupational therapy practitioners continue to adjust to changing regulations, payment reform, and evolving service delivery models, it is vital that we articulate our unique knowledge and skills. Occupational therapy practitioners add distinct value to clients, teams, and systems. Although occupational therapy practitioners are very familiar with advocating for clients, sometimes advocating for themselves or the profession can be more difficult.

Advocacy is defined as the act of speaking up or working on behalf of the interests of another person, group, or cause (Jacobs & McCormack, 2019). Advocacy can occur at the daily practice, professional, or systems level (Hart & Lamb, 2018). While the word *advocacy* sometimes involves large actions such as taking part in a rally, or meeting with your congressional representative, advocacy for occupational therapy can take many forms, including:

- Engaging supervisors in conversations about the policies and procedures in a department
- Sending an email to a regulatory agency
- Educating other professionals about the value of occupational therapy

Occupational therapy practitioners continue to find innovative ways to provide care and to engage in advocacy for the profession. While the American Occupational Therapy Association (AOTA) continues to advocate for occupational therapy at the national and state levels, the involvement of individuals in advocacy is integral to these efforts. Small steps over time can create big changes to the profession. As outlined in the Occupational Therapy Practice Framework: Domain and Process, 4th edition (*OTPF-4*; AOTA, 2020b), professional advocacy and self-advocacy contribute to influencing and distinguishing the profession of occupational therapy.

This document outlines ways to prepare for these everyday advocacy conversations. The items included in this decision guide are based on best practice, and some practitioners may recognize actions that they already engage in on a daily basis.

Ways to Advocate

- ☐ For Clients
 - ☐ Advocate for a client to receive skilled occupational therapy services (e.g., for an unmet functional need or health management)
 - ☐ Utilize shared decision making and provide patient- and family-centered care
 - ☐ Provide client and caregiver education regarding occupational therapy
 - ☐ Write a letter of medical necessity to appeal a third-party payer service denial, if appropriate.
- ☐ For the Profession
 - ☐ Educate yourself and others regarding [advocacy and policy](#) changes
 - ☐ Join in AOTA's grassroots advocacy efforts, or efforts of other groups
 - ☐ Participate in local and state association volunteer organizations
- ☐ For Systems
 - ☐ Build relationships with agencies and individuals that support you and your clients
 - ☐ Share relevant information and statistics with individuals in your network of contacts
 - ☐ Utilize official AOTA document(s) to support your positions (e.g., Code of Ethics (AOTA, 2020a), *OTPF-4*), as well as AOTA advocacy resources
 - ☐ Provide in-services about how occupational therapy as a skilled service improves outcomes and meets the needs of clients

Establish Credibility

- ☐ Establish a track record of handling day-to-day job responsibilities within the practice setting:
 - ☐ Build a solid understanding of work policies and procedures, and clarify with your manager as needed
 - ☐ Prioritize growth as a practitioner and establish competencies
- ☐ Understand the policies and regulations associated with your practice setting
- ☐ Complete documentation in a timely, accurate, and comprehensive manner that reflects the language used in the setting and the skilled nature of the services provided, and adheres to regulatory requirements
- ☐ Build relationships with co-workers, including interprofessional relationships
- ☐ Complete job duties as assigned
- ☐ Be willing to adapt and change
 - ☐ Use change models to guide new programs and initiatives
- ☐ Volunteer for assignments

Prepare for Difficult Conversations

- ☐ Be Prepared
 - ☐ Schedule a meeting time to have discussions
 - ☐ Plan the conversation to focus on the purpose and end result, and consider developing talking points
 - ☐ Do your research: Know what you want to say and how the other person may react; share supporting documentation
 - ☐ Maintain a collaborative mindset
 - ☐ Be organized in your approach; consider developing talking points
- ☐ Be Respectful
 - ☐ Remember that open, and sometimes difficult, conversations are part of a healthy workplace
 - ☐ Maintain mutual respect
 - ☐ Follow the chain of command
 - ☐ Come to the conversation with knowledge and understanding of both sides
 - ☐ Manage emotions, language, and tone
- ☐ Be Clear, and Use Specific Examples
 - ☐ Be honest and thorough
 - ☐ Offer concrete illustrations
 - ☐ Follow up if necessary
- ☐ Offer Solutions:
 - ☐ Anticipate questions and prepare answers in advance
 - ☐ Offer suggestions, clear explanations, and rationale
 - ☐ Frame suggestions in terms of how they will help meet the client's needs or the facilities' goals
 - ☐ Be Direct; Take responsibility

Utilize your Strengths

- ☐ Utilize professional skills for needs assessment, literature review, and clinical reasoning to build a supportive action plan for your area of advocacy
 - ☐ Be proactive about identifying barriers and proposing solutions
- ☐ Connect with professional and academic networks to increase your knowledge and skills base and find advocacy allies
- ☐ Draw on interests or skills to support advocacy (e.g., if writing is a strength, submit an article to a facility newsletter or regional publication; if public speaking is an interest, prepare an in-service for other professionals or a lecture for a community forum)

- ☐ Leverage strengths for advocacy (e.g., video or podcast, graphic design, leading online discussion groups)
- ☐ Share your energy and enthusiasm about the issue, volunteer to educate others

Champion for OT

- ☐ Introduce yourself as an occupational therapist or occupational therapy assistant
- ☐ Develop an “elevator speech” to explain occupational therapy
- ☐ Dispel myths (e.g., *OT is PT for the waist up; OT is only for helping people to get jobs*) about the limits of occupational therapy
- ☐ Post educational information about occupational therapy on social media sites
- ☐ Create an occupational therapy blog
- ☐ Celebrate Occupational Therapy Month at your school or place of employment
- ☐ Submit occupational therapy stories and photos to local newspapers
- ☐ Share information with friends, family members, co-workers, supervisors, and administrators about the value of occupational therapy services
- ☐ Support or participate in evidence-based practice and knowledge translation activities to advance practice
- ☐ Utilize ethical, data-driven decision making

Engage in Active Leadership

- ☐ Engage professionally, and work to build community with your co-workers, supervisors and clients
- ☐ Work to build trust in your work and your decision making
- ☐ Participate in facility committees and quality improvement projects
- ☐ Use active listening and listen to understand, while considering the knowledge, experience, opinions and perspective of others
- ☐ Be proactive and work to solve problems
- ☐ Lead by example and “lead from where you sit” (You do not have to be a manager to lead)
- ☐ Look for opportunities to advocate
- ☐ Set appropriate boundaries with clients and colleagues

Resources

- ☐ AOTA—[About Occupational Therapy](#)
- ☐ AOTA—[Tips on Talking to the Public](#)
- ☐ AOTA—[Top 10 Ways to Promote Occupational Therapy](#)
- ☐ WFOT—[Advocacy Template Letters](#)

References

American Occupational Therapy Association. (2020a). AOTA 2020 occupational therapy code of ethics. *American Journal of Occupational Therapy*, 74, 7413410005. <https://doi.org/10.5014/ajot.2020.74S3006>

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