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RESEARCH ARTICLES

Chapter 8: Qualitative 2022 Summit Discussions

Sarah Malloy, Carol Fricks, Liz Kattman, Caroline Williams

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Introduction

The Qualitative Analysis 2022 Summit Discussions Subcommittee was tasked with reviewing the qualitative data recorded at the Summit held in Dallas-Fort Worth, Texas, on May 13 and 14, 2022. The goals of the subcommittee were to identify themes identified during the discussions recorded over the two days of the 2022 Summit to identify topics that required further exploration, including definitions and future research. These spontaneous discussions occurred during the question and answer sessions and “round table” style discussions. Although the data was unstructured, the subcommittee recognized the importance of its inclusion to ensure a comprehensive representation of discussions, ideas, and opinions of life care planners’ regarding costing. The methods employed by the subcommittee, described below, resulted in multiple costing themes being identified.

Methodology

The subcommittee’s methodology included collecting and analyzing audio recordings and notes taken during the two-day in-person costing 2022 Summit. Due to the volume of data presented, the Summit planning committee chose to create an audio recording of the conference for future reference and assigned Caroline Williams to contemporaneously scribe notes. The audio recordings encompassed the entirety of the two-day Summit, except for the first presentation on day one, at the request of the presenters. The qualitative data gathered by the subcommittee members consisted of audio recordings from the Summit, Caroline Williams’ scribed notes, notes from the presentations and discussions surrounding the presented material. Another data source included were notes from attendees’ “round table” style discussions when asked about costing resources and methodology via Top Hat’s technology platform. Given the volume of recordings and the nature of the data, the collected data was divided amongst the committee members for review and analysis. To ensure a consistent and reliable process, discussion was had prior to the review of the notes and audio recordings and all subcommittee members agreed to analyze their portion of the data in a consistent and unbiased manner to identify topics and concepts that were mentioned on multiple occasions throughout the two days of presentations and discussions. Themes were developed preserving the verbiage used by the attendees participating in the discussion without adaptation or interpretation by the subcommittee members reviewing the data. All identified themes were compared across all portions of the data to identify key overarching themes representative of the entire Summit, and condensed into a single list. Inter-rater reliability was achieved through the comparison of data between individuals and the cross referencing of the recordings with the notes that were taken contemporaneously during the recorded discussion.

Results

The subcommittee identified the following 18 themes and/or areas of consideration for future definitions and research. They were as follows:

1. There are multiple valid techniques for determining costs – telephone calls, e-mail inquiries, internet websites, paid databases, free databases, past bills, and on-site visits.
2. Some costing techniques are more appropriate for particular categories of a life care plan than for others.
3. Usually, each life care planner uses a combination of costing techniques/multiple techniques based on the applicable categories and individual characteristics of the evaluee.
4. Life care planners must be prepared to defend any costing technique used.
5. Each costing methodology needs to be followed consistently.
6. Life care planners must be aware of how legal decisions affect cost determination techniques.
7. The sources of costs presented in a life care plan should be, and typically are, included in the plan.
8. Costs can be presented in a variety of ways – mean, range, median, etc.
9. Life care planners consider the age of the data and geographical and social nuances to evaluate their inclusion for use.
10. Life care planning programs have a role in promoting consistency in, and knowledge of, costing techniques – curriculum differences, continuing education courses, and seminars to update costing knowledge.
11. The percentile chosen to define usual, customary, and reasonable (UCR) costs is variable and can be defended by the individual life care planner.
12. Life care plans are based on objective and consistent methodology interwoven with individual critical thinking.

13. Further research is needed regarding the reliability and validity of life care plans and the costs presented in them.
14. Using three discrete database prices would be preferable to averaging prices from different databases or averaging different percentiles from the same database.
15. All databases are based on billed charges.
16. There is a need for standard definitions of terms used in costing and the differences between terms used, i.e., percentile vs. percentage, cost vs. charge, self-pay vs. cash pay, and UCR.
17. Do we have or need a sampling methodology for choosing vendors/providers when using phone calls to obtain cost data?
18. How can the reliability, validity, and reproducibility of costing methods be enhanced?

Discussion

The above 18 unique themes were identified as recurrent throughout the 2022 Summit across all sets of data reviewed. These themes and the process used to identify them, were presented to the costing committee's working group after completion. Having been derived from an open forum, rather than survey data, this qualitative data identifies unprompted costing concepts considered important by the life care planning community. Through the identification of these themes, gaps in knowledge became apparent emphasizing the need for further education and research surrounding topics related to life care plan costing. It is essential to compare the results of the qualitative analysis to the themes and concepts identified by the analysis of the quantitative survey and Top Hat data to produce a complete synthesis of the costing methods used, the strengths and weaknesses of each, and areas for further research and growth. This comparison will be addressed in chapter 9.

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