

# How to be an effective advocate for Occupational Therapy and embrace being a GO-TO-OT

August 9, 2018



Occupational Therapy Association of California

## Learning Objectives

- Understand how to be a GO-TO-OT advocate for the profession
- Understand how to build relationships with legislators
- Describe current legislative bills that are priority for OTAC



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## Advocacy

- Definition from Merriam Webster dictionary:
  - *the act or process of supporting a cause or proposal*



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## OTAC 2016-2019 Strategic Plan

- Strategic Plan Goals of VALUE and ADVOCACY represent a commitment of the entire OTAC leadership to provide:
  1. COLLABORATION in achieving the goals.
  2. PRIORITIZATION and LEADERSHIP of existing resources and efforts toward these ends for the fiscal years 2016-2019.



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## Advocacy

1. Advance legislation and regulations to strengthen and enhance the role of occupational therapy, and protect the scope of practice in California.
2. Collaborate with key partners and decision-makers including legislators, regulatory boards, insurers, corporate decision-makers, etc., in advocacy activities.
3. Develop quality, comprehensive resources for advocating effectively.



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## Advocacy and Government Affairs Committee

- **Committee Purpose:**
  - To ensure a proactive and timely response to legislative or regulatory activity within the State of California which may impact the practice of occupational therapy.
- **Committee Functions:**
  - To recommend to the OTAC Board of Directors legislative positions on all bills and/or regulations viewed.
  - To recommend amendments to bills or regulations, to the legislature to assure integrity of occupational therapy practice in California.
  - To provide oral and written testimony on government affairs issues as appropriate.
  - To provide the OTAC lobbyist with information necessary to carry positions to the OTAC Board of Directors.
  - To encourage direct interaction of the OTAC membership with legislators at local and state levels.
  - To have direct communication with the OTAC regions.



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## Meet our Lobbyists



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## Meet our Lobbyists




- Jennifer Snyder, MPA, is a partner in Capitol Advocacy, LLC, one of Sacramento's premier lobbying firms. She has 20 years of legislative and advocacy experience with an emphasis on health and human services issues in California. She has a bachelor's degree in political science and a master's degree in health administration. Ms. Snyder's legislative career was spent in the California State Senate for five years as a legislative consultant specializing in health and education issues. She then served as the legislative director for the California Association of Health Facilities and the California Alliance of Child and Family Services. In 2000, she was hired by the California Hospital Association to spearhead their psychiatric hospital advocacy program. Ms. Snyder joined Capitol Advocacy in 2003, and became a partner in 2006. She has since worked with a broad range of clients on a wide array of issues in the legislative, administrative, and regulatory settings.

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## Meet our Lobbyists



- Ivan Altamura, JD, served as chief of staff to two Assembly republican leaders in the California Legislature for nearly a decade. His extensive public policy and political experience enables Altamura to expertly navigate clients through the legislative and regulatory process on a wide spectrum of issues. In the Assembly, Altamura was responsible for providing strategic advice, steering Caucus policy positions, leading republican political efforts through four campaign cycles, and providing tactical counsel to Assembly republican leaders, Connie Conway (R-Tulare) and Mike Villines (R-Fresno), as well as Caucus members. In this role, Altamura was also responsible for direct interaction and collaboration with numerous stakeholders and interest groups to find and build consensus on a broad range of policy matters. In the Legislature, Altamura established and solidified his strong working relationships with elected government officials, lobbyists, and interest groups solving complex and difficult policy issues. Following his time in the Legislature, Altamura was the director of engagement for Pacific Gas & Electric (PG&E). He was also campaign manager for Mike Villines for Insurance Commissioner 2010. Prior to his government relations and political career, Altamura was in private practice as an attorney, focusing on business, estate, civil, and real estate law. Altamura graduated from Fresno State University with a bachelor's degree in criminology and earned his Juris Doctorate from San Joaquin College of Law in Fresno, California.

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OTAC Occupational Therapy Association of California  
A world where all people participate in meaningful occupations to optimize their life experiences.

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## GO-TO-OT: An Occupational Therapy Grassroots Advocacy Initiative



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## GO-TO-OT: An Occupational Therapy Grassroots Advocacy Initiative – **WHAT?**

- Go-To-OT is a grassroots advocacy initiative designed to support the occupational therapy profession in building collaborative and positive relationships with elected officials affording opportunities to educate them about how occupational therapy provides critical services to their California constituents including as well as on OTAC legislative and regulatory positions.



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## GO-TO-OT: An Occupational Therapy Grassroots Advocacy Initiative- **HOW?**

- Each local legislator will have at least one Go-To-OT. Ideally, there will be a local Go-To-OT Team with a designated Team Leader to ensure that the Team is appropriately responsive and has varying degrees of practice area knowledge and experience.
- The Team Leader will be the primary communication conduit with the OTAC Advocacy and Government Affairs Chair.
- Participate in OTAC advocacy training. Topics will include: Advocacy 101, How a Bill Becomes a Law, Tips on How to Speak with Legislators, How to Read and Analyze a Legislative Bill, etc.



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## GO-TO-OT EXPECTATIONS/RESPONSIBILITIES

- General knowledge regarding current legislative and regulatory issues (local, state, national) (training provided).
- Familiarity with OTAC legislative and regulatory agenda and positions on bills (gained through OTAC communications and teleconference meetings).
- Interactions with elected officials/legislator
  - Notify them of your role as a Go-To-OT; what they can expect
  - Subscribe to their electronic newsletters via their website (if they have one)



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## GO-TO-OT EXPECTATIONS/RESPONSIBILITIES

- Attend/schedule local meetings with elected officials to educate them about OT, provide them with information/ perspective on current OTAC bills of interest, and establish rapport
  - Determine with elected official the most effective/ preferred form of communication regarding legislative issues of common concern
- Remain in regular contact with the elected officials via e-mail/phone call/in-person visit; determine frequency
  - Ask elected official to support or oppose bills when appropriate/asked to do so by OTAC
- Attend elected official's hosted community events (e.g., Christmas party, picnics)



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## GO-TO-OT EXPECTATIONS/RESPONSIBILITIES

- Attend local and state level events as appropriate (e.g., OTAC State Advocacy Day in Sacramento; OTAC In-District Advocacy Day)
  - Coordinate member in-district advocacy activities in your local area
  - Be prepared to make presentations as may be requested
- Be a local resource, identifying issues of local concern and report to AGAC
- Attend meetings, including but not limited to, AGAC meetings, town hall meetings, fundraisers, OTAC meetings regarding particular legislative bills



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## GO-TO-OT Eligibility

- Submit application/biographical statement to Karen Polastri
  - Interest in legislative/political action/future of OT
  - Prior connection/experience with legislator (not required), encouraged to participate if already have a current relationship
  - Years of experience as a practitioner
  - Primary practice area
  - Years of engagement in community involvement
  - Description of OTAC volunteer experience/years
  - OTAC membership (required)
- Go-To-OT terms are on the calendar year and are a one-year commitment with additional terms applicable upon mutual agreement.



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## Tips for Building Effective Relations with Elected Officials



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### Do:

- Dress appropriately, at least business casual attire (no jeans, t-shirts).
- Have a neat and clean appearance. You are representing your profession.
- Arrive 5 to 10 minutes ahead of your scheduled appointment.
- Greet them with a firm handshake, good eye contact, and introduce yourself formally as well as everyone present around you.
- Be polite and courteous.
- Study the elected official's biography and the issues they support.
- Be prepared. Know your topic.



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## Do:

- Limit your agenda meeting to two to three topics or issues.
- Cite specific bills, titles, and issues for clarity.
- Find out their knowledge and understanding of occupational therapy.
- Relate information directly to the elected official's constituents (you and the individuals you serve) using personalized stories, helping translate the issues into tangible, practical, and real problems.
- Demonstrate why the particular issue is important to you and the members you represent. Suggest solutions to the issues.



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## Do:

- Be attentive to the elected official's positions, comments, and feedback.
- Prepare a packet to leave with your elected official including informational facts on specific topics or issues, and OTAC.
- Offer to provide any additional information or follow up on any questions they may have.
- Ask when a good time would be to follow up with the elected official and the best method of communication (e-mail, phone, text messaging, etc.). **MAKE SURE TO FOLLOW UP!**



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## Do:

- Ask to be included as a resource for health care matters for the elected official's office.
- Report visits and the outcome to OTAC.
- Send a thank you letter.



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## Do Not:

- Get discouraged if your legislator is late to the meeting or if you meet instead with an elected official's representative or aide. Elected official's schedules are very unpredictable.
- Overstay your welcome. Keep track of the length of your appointment.
- Assume the elected official knows about occupational therapy.
- Assume that the elected official is familiar with the issues you are to present. There are many bills, issues, and regulations introduced and elected officials and their representatives will not be able to remember all of them.



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### Do Not:

- Discuss numerous bills or address unrelated issues. Stay on course. Be direct, concise, clear, and succinct.
- Maintain a narrow-minded perspective. Be attentive and open to differing views and feedback.
- Be angry, threatening, or confrontational. Always leave the elected official's office with a positive feeling and a future desire for collaboration.
- Consider the meeting as a one-time event. Develop a working relationship with your elected officials.



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## Find Your Legislator



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## Find Your Legislator

- Find your legislator by zip code and links to legislators' websites. Check it out at <http://findyourrep.legislature.ca.gov/>



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Find Your California Representative

Enter your California address and click the locate button to find your State Senate and Assembly representatives.


Street Address:  City:  Zip:

We strive to be able to assist you in your search. If you are unable to find your district please contact your local county registrar or elections department.

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State Assembly (District 4)  
[Assembly Member Cecilia M. Aguilar-Curry-DEM](#)

State Senate (District 3) ← **Clicking on the highlighted name takes you to their website**  
[Senator Bill Dodd-DEM](#)



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### Senator Bill Dodd




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## Sign Up For Newsletters

- Learn more about your legislators
- Learn about bills that they are sponsoring
- Learn about upcoming events in your district



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### Sign Up For Newsletters




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### Senator Mike McGuire



Dear Neighbor,

As the Democratic County Congress First candidate to grow, we are working closely with both Republicans and Labor County officials and County Board members to make sure that the health care system in Contra Costa County, the heart of the East Bay Free State and all that we love, is the best it can be.

There's one of the reasons I'm standing to help build our annual Contra Costa County Fair coming up this Thursday August 9.

We're going to be able to do for necessary and affordable health care, as well as our progress with the fair and a number of other things, including:

- Making investments in our kids and public schools.
- The economy and the state budget.
- Housing and homelessness funding.
- Regional and national infrastructure and
- Making sure that every citizen has an equal and affordable health care.



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### Assemblymember Chris Holden



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### Locate & Track Legislative Bills



### Locate & Track Legislative Bills

- **Locate and Track.** Do you want to find legislative bill information on your own? Track bills of interest to you? Bookmark your favorite bills? Go to this link <http://leginfo.legislature.ca.gov/>



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The screenshot shows the homepage of the California Legislative Information website. At the top, there is a navigation bar with links for Home, Bill Information, California Law, Publications, Other Resources, My Subscriptions, and My Favorites. The main content area includes a 'WELCOME' message, a 'TODAY'S SCHEDULE' for Monday, July 30, 2018, and search options for bills and codes. A sidebar on the right lists 'Daily Updates' for Assembly, Senate, and Daily Files, along with 'Quick Links' to various archives and databases. The OTAC logo and name are at the bottom.

The screenshot shows the detailed page for Assembly Bill 2221, titled 'Occupational therapy'. It includes a 'Text' tab, a 'History' tab, and a 'Bill Analysis' tab. The page lists the bill's history: AMENDED IN SENATE JULY 02, 2018; AMENDED IN SENATE JUNE 11, 2018; AMENDED IN ASSEMBLY APRIL 05, 2018; and AMENDED IN ASSEMBLY MARCH 23, 2018. It identifies the bill as 'ASSEMBLY BILL No. 2221' and notes it was introduced by Assembly Member Bloom on February 12, 2018. The OTAC logo and name are at the bottom.

The slide features a photograph of the California State Capitol building in Sacramento. Overlaid on the image is the text 'LEGISLATIVE UPDATE' in white, bold, capital letters. The OTAC logo and name are at the bottom.

The slide contains the text 'AB 3110-Athletic Trainer Practice Act' centered on a white background. The OTAC logo and name are at the bottom.

### AB 3110-Athletic Trainer Practice Act

- This bill seeks to require all athletic trainers to be on a registry list maintained by the proposed Athletic Trainer Board.
- This bill would also establish the Athletic Training Practice Act defining athlete and athletic training as well as setting the requirements to be considered an athletic trainer.
- OTAC opposes this bill in its current form as the definition for athletic training is overly broad and concerns related to the physician supervision requirements.



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### AB 3110-Athletic Trainer Practice Act

- Read the full bill here  
[http://leginfo.legislature.ca.gov/faces/billTextClient.xhtml?bill\\_id=201720180AB3110](http://leginfo.legislature.ca.gov/faces/billTextClient.xhtml?bill_id=201720180AB3110)
- OTAC continues to work toward amending this bill to adequately address these concerns.



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### AB 3110-Athletic Trainer Practice Act

- Has passed the Senate Policy Committee and will now move to Senate Appropriations Committee to be heard on August 13, 2018.



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### AB 3110-Athletic Trainer Practice Act

- This bill continues to be amended:

AMENDED IN SENATE AUGUST 06, 2018

AMENDED IN SENATE JUNE 20, 2018

AMENDED IN ASSEMBLY MAY 25, 2018

AMENDED IN ASSEMBLY MAY 09, 2018

AMENDED IN ASSEMBLY MAY 01, 2018

AMENDED IN ASSEMBLY APRIL 11, 2018



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# AB 3110-Letter of Opposition



Issue No. 3110  
The Assembly, Pursuant to Senate Bill Number 1000, has passed Senate Bill Number 3110, which is known as the \_\_\_\_\_.

OTAC opposes the proposed legislation because it is in violation of the public interest and the interests of occupational therapists. The proposed legislation would \_\_\_\_\_.

OTAC is a 501(c)(3) nonprofit organization. We are a non-partisan organization and do not take positions on any political issue. We are a professional association of occupational therapists and we are committed to the highest standards of ethical and professional practice.

To learn more, or for more information, please contact the OTAC at \_\_\_\_\_.

OTAC  
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# Appropriations Committee



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# Members

- [Senator Anthony J. Portantino \(Chair\)](#)
- [Senator Patricia Bates \(Vice Chair\)](#)
- [Senator Jim Beall](#)
- [Senator Steven Bradford](#)
- [Senator Jerry Hill](#)
- [Senator Jim Nielsen](#)
- [Senator Scott Wiener](#)



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# Function

- The duty of the Appropriations Committee, comprising nine members, is to investigate and study any proposed bills imposing a state-mandated local program, or bills subject to Joint Rule 10.5 that are not referred to the [Budget and Fiscal Review Committee](#).
- As a standing committee of the California State Senate, the Appropriations Committee has the following powers:
  - To appoint a secretary or hire clerical, technical or legal assistants as necessary.
  - The committee may summon or subpoena — with prior approval from the Committee on Rules — witnesses and material documents as necessary in its investigation of a bill or law. Subpoenas approved by the Committee on Rules shall be served by the California State Senate Sergeant at Arms, or a designee selected by the Sergeant at Arms.
  - All departments, agencies and subdivisions of the state of California, as well as the Legislative Counsel and individuals — regardless of his or her connection to the state government — are required to produce any information, records and documents requested by the committee as necessary.
  - All standing committees are allowed to meet at the State Capitol as necessary to perform their duties, and may spend such money as is made available by the Senate for that purpose.
  - Unless the money has been made available prior, a committee may not incur debt.



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## Function

- As a standing committee, the Appropriations Committee is also governed by the following rules:

- The officers of each committee shall consist of a chair, vice chair and secretary.
- The chair shall preside at all meetings when present, unless he or she is the sole or lead author of a bill under consideration. If the chair is unable to preside over a meeting, the duty shall fall to the vice chair. Should both members be absent, a member designated by the chair shall preside over the meeting.
- The secretary of the committee is required to keep an accurate record of the meetings and actions as taken by the committee. Bills and other measures approved by the committee shall be reported as soon as possible to the Senate.
- The committee is required to meet on a day and hour as designated by the Committee on Rules.
- Special meetings may be called at the discretion of the chair — following approval by the Committee on Rules — by providing reasonable notification of all members of the time, location and subject of the meeting. Matters may not be considered in a special meeting unless prior notice is given in the Daily File. Special meetings should be scheduled so as to allow all members to attend without scheduling conflicts.
- A majority of the membership of a committee constitutes quorum. A majority vote shall be required to table a bill, remove it from the table or reconsider a vote on a bill.
- Committee members may not take action on a bill outside of a scheduled committee meeting.
- The chair of the committee shall be responsible for setting hearings of bills and arranging the calendar for committee hearings. A bill hearing may not take place unless the bill's author has been notified. Unless written authorization is provided by the bill's author, a bill may not be considered without the presence of the bill's author.
- All meetings shall be open and public, aside from for any purposes authorized by Section 9029 of the Government Code, in which case a committee or subcommittee — by majority vote — may meet in executive session.
- The chair shall be responsible for keeping decorum and directing the order of presentation of the arguments for and against matters for consideration by the committee.
- A bill voted out of a committee or defuncted shall only be reconsidered if a motion to reconsider a bill is approved by a majority vote of the committee or if the procedures for reconsideration conform to Joint Rule 62, subdivision (a).
- Any bill laid on the table and then removed from the table at a later meeting may not be heard until a subsequent committee meeting is held and after being calendared in the Daily File and other notice is given.
- If proposed amendments are adopted to a bill in committee, the bill may be voted on at that meeting, or may be taking out to print before final action. Improperly formatted amendments shall be prepared correctly and submitted to the chair for approval. If the chair finds amendments submitted by the author to be major or substantial, the documents must be submitted to the committee at least two legislative days prior to the scheduled hearing.
- Prior to consideration by a standing committee, all bills must be referred by the Committee on Rules.
- The chair of the committee has the power, with permission from the Committee on Rules, to appoint subcommittees.



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## Function

- As a standing committee, the Appropriations Committee must adhere to the additional rules as follows:
  - Committees may adopt additional rules as long as they do not come into conflict with the previous rules.
  - A majority vote from a standing committee is required to report a bill, constitutional amendment, concurrent resolution or joint resolution out of the committee.
  - In order to report a Senate resolution out of a committee, a majority vote from a standing committee is required.
  - Just as any member would, a standing committee may introduce a bill concerning any subject within the scope of that committee's consideration. A committee bill shall include the signatures of each member of the committee.
  - A committee vote shall be by roll call vote if the members are voting on the disposition of bills, constitutional amendments, concurrent resolutions and joint resolutions by committees.



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## AB 2221-OT Practice Act Modernization



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## AB 2221-OT Practice Act Modernization

- This bill is co-sponsored by OTAC and AOTA to provide necessary updates to the California Occupational Therapy Practice Act. This bill seeks to:
  - Change the current definition of occupational therapy to match the newest definition in use by AOTA;
  - Include explicit statements linking occupational therapy to mental health practice;
  - Remove the post-professional requirement for advanced practice education; and
  - Further define continuing competence and its' requirements



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## AB 2221-OT Practice Act Modernization

- Read the full bill [here](http://leginfo.legislature.ca.gov/faces/billNavClient.xhtml?bill_id=201720180AB2221)  
[http://leginfo.legislature.ca.gov/faces/billNavClient.xhtml?bill\\_id=201720180AB2221](http://leginfo.legislature.ca.gov/faces/billNavClient.xhtml?bill_id=201720180AB2221)



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## AB 2221-OT Practice Act Modernization

- Existing law, the Occupational Therapy Practice Act, provides for the licensure and regulation of the practice of occupational therapy by the California Board of Occupational Therapy. Existing law defines the "practice of occupational therapy" and specifies that occupational therapy services encompass occupation therapy, assessment, treatment, education, and consultation with individuals referred for those services after diagnosis of a disease or disorder. Existing law prohibits a person from practicing occupational therapy without being licensed under the act and makes a violation of that prohibition a crime.
- This bill would instead define "occupational therapy" for purposes of the act, and would make conforming changes. The bill would also eliminate the reference to a referral after diagnosis in the description of occupational therapy services. By expanding the scope of a crime, the bill would impose a state-mandated local program.
- Existing law defines the term "occupational therapist" and specifies that only the occupational therapist is responsible for the occupational therapy assessment of a client and the development of an occupational therapy plan of treatment.



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## AB 2221-OT Practice Act Modernization

- This bill would instead specify that the occupational therapist is responsible for and directs the evaluation process and develops the intervention plan.
- Existing law requires the occupational therapy board to ensure proper supervision of occupational therapy assistants and aides and allows an occupational therapist to supervise no more than 2 occupational therapy assistants at any one time. Existing law provides for aides to be supervised by occupational therapists or occupational therapy assistants and defines the term "aide" for purposes of the act to mean an individual who provides supportive services to an occupational therapist.
- This bill would increase the number of occupational therapy assistants an occupational therapist may supervise to 3. This bill would also revise the definition of "aide" to conform to the authority for an aide to also be supervised by an occupational therapy assistant. The bill would specify that the occupational therapist is responsible for the overall use and actions of the aide.



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## AB 2221-OT Practice Act Modernization

- Existing law requires an occupational therapist providing hand therapy services or using physical agent modalities to demonstrate to the satisfaction of the board that he or she has completed post professional education and training in specified areas.
- This bill would eliminate the post professional limitation.
- Existing law requires an applicant for an occupational therapist license to, among other things, complete a specified educational program and pass a specified examination. Existing law requires the board to approve the examinations for licensure and also authorizes the board to adopt rules relating to professional conduct to carry out the purposes of the act. Existing law requires the curriculum for an educational program for occupational therapists to contain the content required or approved by specified organizations, and specifies a list of subjects that must be included in the program.
- This bill would delete that list of subjects. The bill would also authorize, rather than require, the board to approve licensure examinations and would authorize the board to adopt rules necessary to effectuate the purpose of the act.



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### AB 2221-OT Practice Act Modernization

- Existing law authorizes the board to establish and require the satisfactory completion of continuing competency requirements as a condition of renewal of a license.
- The bill would instead require the board to do so, and would authorize only a portion of continuing competence requirements to be fulfilled through competency assessment activities performed in the context of a broader professional development plan. The bill would also provide a definition for the term "continuing competence."



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### AB 2221-OT Practice Act Modernization

- Existing law prohibits a person from using specified professional abbreviations and terms intended to represent that the person is authorized to practice occupational therapy or assist in the practice of occupational therapy unless the person is licensed to practice as an occupational therapist or occupational therapy assistant.
- This bill would revise the list of abbreviations and terms that may not be used without a license. *This bill would provide that an occupational therapist, or an occupational therapy assistant, that is serving as an educator in an education program for occupational therapists in California must be licensed.*
- The bill would replace references to "patient" with "client" throughout the act and would enact other related provisions.
- The California Constitution requires the state to reimburse local agencies and school districts for certain costs mandated by the state. Statutory provisions establish procedures for making that reimbursement.
- This bill would provide that no reimbursement is required by this act for a specified reason.



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### AB 2221-OT Practice Act Modernization

- Has passed the Senate Policy Committee unanimously. It must now be heard by the Senate Appropriations Committee by Friday, August 17, 2018.



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### AB 2221-OT Practice Act Modernization

**CALL TO ACTION AB 2221**

**Support Modernization of the OT Practice Act**

Below the Bill, the OTAC requested the legislative review. AB 2221 provides necessary updates to the Occupational Therapy Practice Act. This bill would change the current definition of occupational therapy to match the current definition used by AOTA, which includes elements linking occupational therapy to overall health practice, remove the prior professional requirements for clinical practice, and add an element on continuing competency requirements. It also sets the bill as a priority item.

**Bill Status:** AB 2221 has passed the Senate Business, Professions, & Economic Development, C, A, & D Committee, and will now be heard by the Senate Appropriations Committee. The bill must be heard by Friday, August 17.

**TAKE ACTION NOW!**

Write a Letter: Please submit a letter of support to the Senate Appropriations Committee members. It is important to continue demonstrating a strong desire of support for this bill as a priority through legislation. A template letter and instructions have been posted on [www.otac.org](http://www.otac.org). Submit letters by Friday, August 17 at 5:00 pm.

**Call the Committee:** Members, Representatives, meet to hear from the individuals the bill will affect, especially if you are not from the committee. Please contact your Member by Thursday, August 16th to share your support. Listed below are the Senators on the Senate Appropriations Committee, their districts, and their contact information. Please message or telephone your support key contacts.

**Notes:** California Civil Code, Article 1775, and 1776, support AB 2221. The Occupational Therapy Practice Act Modernization. The OT Practice Act has not been updated since its inception in 1989 and these changes are most needed to reflect the current practice of occupational therapy. Thank you.



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## AB 2221-OT Practice Act Modernization

SENATE APPROPRIATIONS			
Member	District	Party	Phone
Committee Staff			916 651 4101
<a href="#">Purcell, Anthony</a> (Chair)	25	D	916 651 4025
<a href="#">La Canada Flintridge</a> <a href="#">Bates, Patricia</a> (Vice Chair)	36	R	916 651 4036
<a href="#">Laguna Niguel</a> <a href="#">Heal, Jim</a> San Jose	15	D	916 651 4015
<a href="#">Bradford, Steven</a> Cupertino	35	D	916 651 4035
<a href="#">Hills, Jerry</a> San Mateo	13	D	916 651 4013
<a href="#">Nichols, Jim</a> Red Bluff	4	R	916 651 4004
<a href="#">Wagner, Scott</a> San Francisco	11	D	916 651 4011



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## AB 2386 - OT and PT Services Credential in Public Schools



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## AB 2386 - OT and PT Services Credential in Public Schools

- Has been held on suspense in the Assembly Appropriations Committee. The bill will not be moving forward through the legislative process this year, however OTAC and CPTA are moving forward to explore options in support of a CTC OT/PT school services credential work group.



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## AB 2386 - OT and PT Services Credential in Public Schools

- SUMMARY
  - The Occupational Therapy Association of California (OTAC) supports AB 2386 (Rubio), which would direct the Commission on Teacher Credentialing (CTC) to determine the qualifications and process required for occupational therapists who work in public schools to obtain a Services Credential. The proposed credential would ensure continued and future high-quality occupational therapists who can positively impact the education and future of California's diverse students, schools, and communities.



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## AB 2386 - OT and PT Services Credential in Public Schools

### • BACKGROUND

- Occupational therapists have been providing educationally related services to students in public schools since the 1970s. Occupational therapy (OT) services are mandated under Individuals with Disabilities Education Act (IDEA, 2004) and designed to help children develop, improve, or restore functional and academic skills to support access and progress in their education. OT services can be essential for students as it promotes function and engagement in everyday routines preparing children to be college and career ready. There are approximately 16,000 occupational therapists currently licensed in California, of which nearly 20% (3,200) are estimated to practice in school-based settings.
- The Commission on Teacher Credentialing (CTC) is the governing body that grants credentials for school employees in the state of California. Examples of credentialed personnel are teachers, school psychologists, school counselors, social workers, nurses, audiologists, and speech and language pathologists. General requirements in order to obtain these credentials include: a) baccalaureate degree or higher, b) specialized and professional preparation, c) possession of a valid license, certificate, or registration, and d) mentored practical experience. These requirements are met in occupational therapy professional preparation through accredited programs.



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## AB 2386 - OT and PT Services Credential in Public Schools

### • PROBLEM

- The CTC offers a wide variety of credentials to ensure high-quality instruction, intervention, and opportunities to serve students. Under Education Code provisions, occupational therapists do not have an option to obtain a credential and have not been included in the credentialing process. Credentialing affords an OT with the professional status that is commensurate with their knowledge base and education.
- In order to pursue an administrative credential, educators need to have a prerequisite credential. Under current law, occupational therapists do not have a prerequisite credential option thus limiting opportunities to assume leadership roles, which would be of benefit to schoolwide student outcomes.



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## AB 2386 - OT and PT Services Credential in Public Schools

### • SOLUTION

- The CTC has the authority to determine what requirements will be necessary for an OT to be credentialed in the schools. AB 2386 will direct the CTC to work with a group of stakeholders to develop the recommended requirements for an OT credential by July 1, 2020 and report these recommendations to the Legislature and the Governor.
- Occupational therapists have a proven ability to augment student outcomes within the school-based setting while serving as integral and collaborative team members at all levels. With clear direction from the CTC, the Legislature can then move forward with providing OTs with authorization to become credentialed with the CTC.



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## GO-TO-OT Events



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## GO-TO-OT Events

- We will be implementing regional in-person AGAC meetings to be led by regional GO-TO-OTs and they will be held on the second Saturday of the second month in each quarter at 10:00am.
- Each region will have at least one event so that there will be at least 5 in-person events happening at the same time across the state.
- The dates of the GO-TO-OT events will be:
  - August 11<sup>th</sup>
  - November 10<sup>th</sup>
  - February 9<sup>th</sup>
  - May 12<sup>th</sup>.



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## GO-TO-OT Events

- These are meant to be very casual and can be hosted at a local coffee shop.
- At least one volunteer from each region will be needed to take lead on these events.
  - It does not have to be the same person each quarter and can be multiple people.
  - It can even be multiple people in different cities to have multiple events occurring in the same region at the same time.



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## GO-TO-OT Events

- The lead person will be identified and the location will be confirmed at least 4 weeks in advance so that we can advertise it on the OTAC website and via email blasts.
  - *Best practice would be to have the lead person identified at least 8-10 weeks in advance to allow ample time for advertising.*
  - *For example, for the November 10<sup>th</sup> event we would want to know who the lead is and the location by September 1<sup>st</sup>.*



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## GO-TO-OT Events

**BUILDING OT CAPACITY**

**OTAC 2018 Annual Conference & Expo**  
October 12-13, 2018  
Hilton Rosemead & Pasadena Convention Center

OT Coffee Meet-Up:  
Learn What's New in OT Advocacy Activities  
Hosted By Lauren Hoffle, MA, OTR/L

Come chat with OTAC's GO-TO-OT for your area to learn about this initiative's goal to connect more regularly, and personally, with your local selected representatives in adjacent states.

Conference Website  
Hotel Reservations



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### GO-TO-OT Events: Prior to Event

- Prior to each event, the lead GO-TO-OT will be provided the latest legislative updates so that they will be informed and able to answer questions during their meeting.



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### GO-TO-OT Events: Day of Event

- The lead GO-TO-OT will:
  - Arrive to the location early to secure a table or place for everyone to gather
  - Facilitate the conversation about advocacy
  - Pay for attendees cup of cup or tea
  - Take pictures of the event to share with OTAC and on social media
  - Post about the event on twitter @OTACnews #GOTOOT



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### GO-TO-OT Events: Post Event

- The lead GO-TO-OT will be responsible for completing the OTAC Advocacy and Government Affairs Committee Member Report on Attendance at Meetings and returning to Sabrena and Karen.
- The lead GO-TO-OT will be responsible for submitting reimbursement form to the OTAC office in a timely manner.



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### GO-TO-OT Events: The in-between time.....

- You do NOT have to wait until November to gather with fellow clinicians to discuss advocacy
- You can attend events hosted by your legislators
- You can gather a group of clinicians together and schedule a visit to your legislators district office



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# Government Affairs Committee Member Report on Attendance at Legislative Meetings/Legislative Events



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Legislative Meeting:

Purpose of Legislative Meeting/Legislative Event:

Meeting/Event Location:

Meeting/Event Dates:

OTAC Members/OTAC Representatives in Attendance:

Meeting/Event Highlights:

OTAC Follow Up Items (including who is to follow up and due date):

Additional Notes:

Submitted By: \_\_\_\_\_ Date: \_\_\_\_\_

Please submit report to Karen Spahr [kspahr@otacalifornia.org](mailto:kspahr@otacalifornia.org) and Barbara McPhee [bmcph@otacalifornia.org](mailto:bmcph@otacalifornia.org) within 3 business days from meeting conclusion.



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# Advocacy in Action



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## Be a Virtual Advocate

- **Find Your Legislators.** Find who your legislators are and receive links to their websites by entering your address [here](https://findyourrep.legislative.ca.gov/) (<https://findyourrep.legislative.ca.gov/>).
- **Locate and Track.** Do you want to find legislative bill information on your own? Track bills of interest to you? Bookmark your favorite bills? Do it [here](https://leginfo.legislature.ca.gov/) (<https://leginfo.legislature.ca.gov/>).
- **Internet.** You can support advocacy by listening to hearings, floor sessions, and press conferences over the Internet. [Senate](https://www.senate.ca.gov/calendar) (<https://www.senate.ca.gov/calendar>). [Assembly](https://www.assembly.ca.gov/audioandtv) (<https://www.assembly.ca.gov/audioandtv>).
- **TV.** You can view legislative proceedings on the California channel. [Check it out](http://www.calchannel.com/live-webcast/) (<http://www.calchannel.com/live-webcast/>).



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## Other Organizations

- California Office of the Governor (<https://www.gov.ca.gov/>).
- California Board of Occupational Therapy (<https://bot.ca.gov/>).
  - Attend their Board meetings! Dates and locations posted [here](http://www.bot.ca.gov/board_activity/meetings/index.shtml) ([http://www.bot.ca.gov/board\\_activity/meetings/index.shtml](http://www.bot.ca.gov/board_activity/meetings/index.shtml)).
  - Locate information about licensing and proposed new regulations [here](http://www.bot.ca.gov/board_activity/laws_regs/regulations.shtml) ([http://www.bot.ca.gov/board\\_activity/laws\\_regs/regulations.shtml](http://www.bot.ca.gov/board_activity/laws_regs/regulations.shtml)).
  - Get involved on a CBOT committee \*
- Division of Workers Compensation ([https://www.dir.ca.gov/dwc/dwc\\_home\\_page.htm](https://www.dir.ca.gov/dwc/dwc_home_page.htm)).
- AOTA Federal Affairs (<https://www.aota.org/Advocacy-Policy.aspx>).



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## Available Fact Sheets

- Tips for Building Effective Relations with Elected Officials
- How a Bill Becomes a Law
- State versus Federal Legislative Process
- Common Legislative Terms
- Critically Reading Legislative Bills
- Go-To-OT Fact Sheet



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