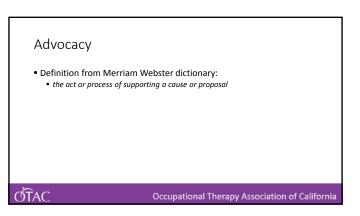


Learning Objectives • Understand how to be a GO-TO-OT advocate for the profession • Understand how to build relationships with legislators • Describe current legislative bills that are priority for OTAC

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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.
 - 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
- Collaborate with key partners and decision-makers including legislators, regulatory boards, insurers, corporate decision-makers, etc., in advocacy activities.
- Develop quality, comprehensive resources for advocating effectively.

Occupational Therapy Association of California

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 experity 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 responsible for providing strategic advice, steering Caucus policy positions, leading counsel to Assembly republican leaders, Comie Conway Re-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 solidfied his strong working relationships with elected 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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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.



Occupational Therapy Association of California

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 ranger!
- 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)

OTAC

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 relation- ship
 - 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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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.

OTAC

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!



Occupational Therapy Association of California

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.

OTAC

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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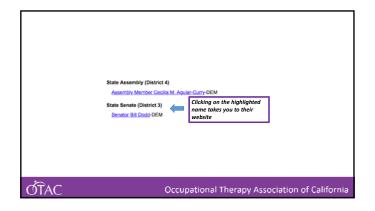


Find Your Legislator

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

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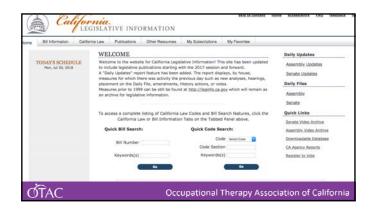






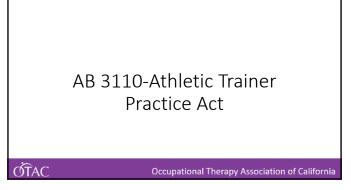












AB 3110-Athletic Trainer Practice Act

- 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=201 720180AB3110
- 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

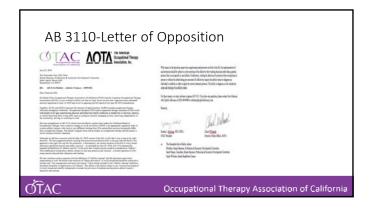
AMENDED IN ASSEMBLY MAY 25, 2018

AMENDED IN ASSEMBLY MAY 09, 2018

AMENDED IN ASSEMBLY MAY 01, 2018

AMENDED IN ASSEMBLY APRIL 11, 2018

OTAC





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 Occupational Therapy Association of California

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 <u>Budget and Fiscal Review Committee</u>. • As a standing committee of the California State Senate, the Appropriations Committee has the following powers: • To appoint a secretary or hire derical, technical or legal assistants as necessary. • The committee may summon or subpoers — with prior approved by the Committee on Rules — witnesses and material documents as necessary in its investigation of a bill or law. Subpoens approved by the Committee on Rules — witnesses and material documents as necessary in the investigation of a bill or law. Subpoens approved by the Committee on Rules and Individuals — regardless. • All departments, agencies and subdivisions of the state of California, present at Arms. • 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.

Function 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 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 chart shall provide at all meetings when present, valent in or or the it the sole or lead author of a bill under condictation. If the chart is unable to preside over a meeting, the duty all tall to the vice chart. Device that the meeting as and actions as taken by the committee is like and other meeting. The committee is committee in committee in the chart is unable to preside the parameters are considered to the chart is committee or the chart is committee. The committee is committee in the chart is unable to preside the parameters are considered to the chart is committee or the committee or the chart is committee or the chart is committee or reconsider a vote on a bill. Committee meeting is only the chart is committee or committee or the chart is committee or committee or committee or the chart is committee or committee or committee or the committee or committee or the chart is committee or commi

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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.

 - 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 visc that be by roll call wote if the members are voting on the disposition of bills, constitutional amendments, concurrent resolutions and point recolutions by committee.

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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
 - 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 <u>here</u> 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
 regulation on all Therapy Existing law processes and therapy and
 specifies that occupational therapy services encompass occupational 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.



Occupational Therapy Association of California

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 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

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AB 2386 - OT and PT Services Credential in Public Schools

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Occupational Therapy Association of California

AB 2386 - OT and PT Services Credential in Public Schools

Has been held on suspense in the Assembly Appropriations
 Committee. The bill will <u>not</u> 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.

OTAC

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

BACKGROUND

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 Occupational therapists have been providing educationally related services to students in public schools since the 1970s, Occupational therapy (OT) services are mandated under public schools since the 1970s, Occupational therapy (OT) services are mandated under under the control of the control o

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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.

OTAC



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 11th
 - November 10th
 - February 9th
 - May 12^{th.}

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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 neonle.
 - 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 10th event we would want to know who the lead is and the location by <u>September 1st</u>.

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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

OTAC

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









Be a Virtual Advocate

- Find Your Legislators. Find who your legislators are and receive links to their websites by entering your address <u>here</u> (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 https://leginfo.legislature.ca.gov/).
- Internet. You can support advocacy by listening to hearings, floor sessions, and press conferences over the Internet. <u>Senate</u> (https://www.senate.ca.gov/calendar). <u>Assembly</u> (https://www.assembly.ca.gov/audioandty).
- TV. You can view legislative proceedings on the California channel. <u>Check it out (http://www.calchannel.com/live-webcast/)</u>.

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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 <u>here</u> (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).
 - Get involved on a CBOT committee *
- Division of Workers Compensation (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 Effected 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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Occupational Therapy Association of California

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