

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

August 9, 2018



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



Advocacy

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

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.

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.

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.

Meet our Lobbyists



Occupational Therapy Association of California

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.



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.



Occupational Therapy Association of California

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Occupational Therapy Association of California

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



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.

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.

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)

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)

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

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.

Tips for Building Effective Relations with Elected Officials



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.

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.

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!**

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.

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.

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.

Find Your Legislator



Find Your Legislator

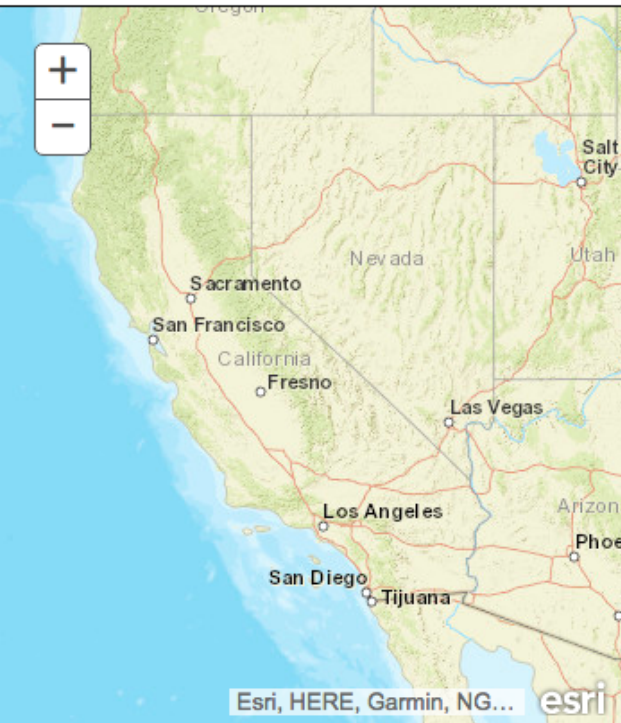
- Find your legislator by zip code and links to legislators' websites. Check it out at <http://findyourrep.legislature.ca.gov/>

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[Assembly Member Cecilia M. Aguiar-Curry-DEM](#)

State Senate (District 3)

[Senator Bill Dodd-DEM](#)



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Senator Bill Dodd



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SENATOR BILL DODD
Senate District 3

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CALIFORNIA
SENATOR BILL DODD
Senate District 3

A Message from Senator Bill Dodd

Dear Neighbor,

As this summer continues, I hope you have enjoyed yourself, whether you cheered from the sidewalk at a Fourth of July parade, entertained friends at a backyard barbecue or spent quality time with loved ones. This is a season to relax and recharge.

Unfortunately, we're witnessing a destructive and early start to our wildfire season with devastation striking at the heart of our district. With the threat of more fires to come, I have begun working with Senate and Assembly leaders on a comprehensive wildfire preparedness bill that will strengthen the electric utility grid while protecting ratepayers from absorbing unfair costs. Details will emerge over the next month in a series of public hearings at the Capitol. I will keep you informed.

Meanwhile, I'm pleased to say we've passed a landmark online privacy and personal data protection law. The California Consumer Privacy Act of 2018, which I co-wrote with Senate and Assembly colleagues, became the toughest law of its kind in the nation. As someone who has personally experienced data theft, I couldn't be happier to get this law on the books.

A highlight of summer is celebrating the good work of nonprofit organizations. I was proud to name Napa Valley Community Foundation as the Nonprofit of the Year. Robust philanthropy such as theirs is a cornerstone of a healthy and prosperous society.

In this Issue:

- [Disaster Preparedness](#)

Senator Mike McGuire



Dear Neighbor,

As the Mendocino County Complex Fires continue to grow, we are working closely with both Mendocino and Lake County officials and moving additional resources into Lake County to help our neighbors in need. Here in Sonoma County, the memories of the North Bay Fire Storm are still fresh and we live with its impacts daily.

That's one of the reasons I'm checking in today about our annual Sonoma County Town Hall coming up this Thursday, August 2.

We're giving an update on our fire recovery and #RebuildStrong efforts, as well as our progress over the last year on a number of fronts, including:

- Historic investments in our kids and public schools;
- The economy and the jobs outlook;
- Housing and homelessness funding;
- Progress on combating climate change; and
- Blocking President Trump's plans to open up oil drilling off our coast.

Assemblymember Chris Holden



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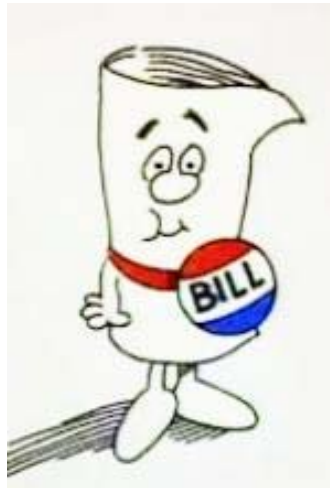
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TODAY'S SCHEDULE
Mon, Jul 30, 2018

WELCOME

Welcome to the website for California Legislative Information! This site has been updated to include legislative publications starting with the 2017 session and forward. A "Daily Updates" report feature has been added. The report displays, by house, measures for which there was activity the previous day such as new analyses, hearings, placement on the Daily File, amendments, History actions, or votes. Measures prior to 1999 can be still be found at <http://leginfo.ca.gov> which will remain as an archive for legislative information.

To access a complete listing of California Law Codes and Bill Search features, click the California Law or Bill Information Tabs on the Tabbed Panel above.

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AB-2221 Occupational therapy. (2017-2018)

Text	Votes	History	Bill Analysis	Today's Law As Amended	Compare Versions	Status	Comments To Author
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Date Published: 07/02/2018 02:00 PM

AMENDED IN SENATE JULY 02, 2018
 AMENDED IN SENATE JUNE 11, 2018
 AMENDED IN ASSEMBLY APRIL 05, 2018
 AMENDED IN ASSEMBLY MARCH 23, 2018

CALIFORNIA LEGISLATURE— 2017–2018 REGULAR SESSION

ASSEMBLY BILL

No. 2221

Introduced by Assembly Member Bloom

February 12, 2018

An act to amend Sections 2570.2, 2570.3, 2570.6, 2570.7, 2570.10, 2570.14, 2570.18, 2570.185, 2570.20, 2570.28, 2570.29, and 2571 of the Business and Professions Code, relating to healing arts





AB 3110-Athletic Trainer Practice Act

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.

AB 3110-Athletic Trainer Practice Act

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

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.

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

AB 3110-Letter of Opposition



June 25, 2018

The Honorable Jerry Hill, Chair
Senate Business, Professions & Economic Development Committee
State Capitol, Room 5035
Sacramento, CA 95814

RE: AB 3110 (Mullin) – Athletic Trainers – OPPOSE

Dear Chairman Hill,

On behalf of the Occupational Therapy Association of California (OTAC) and the American Occupational Therapy Association (AOTA), we are writing to inform you that we must revise our previous "opposed unless amended" position registered on June 14, 2018 and revert to opposing the bill based on the June 20, 2018 amendments.

Together, OTAC and AOTA represent the interests of approximately 16,000 licensed occupational therapy clinicians throughout California. Occupational therapists (OTs) and occupational therapy assistants (OTAs) work with people of all ages experiencing physical and behavioral health conditions or disabilities to develop, improve, or restore functional daily living skills, such as caring for oneself, managing a home, achieving independence in the community, driving, or returning to work.

Previous amendments to AB 3110, which removed athletic trainers from under the California Board of Occupational Therapy, were a positive change as we do not believe CBOT is the appropriate regulatory body to oversee athletic trainers, who receive very different training from OTs and perform services that greatly differ from occupational therapy. The Board's singular focus and oversight on occupational therapy and the people it serves remains critically important.

Although we did have concerns with the May 25, 2018 version of the bill, we felt that it was a step in the right direction. We have supported athletic training title protection/certification bills in the past and still believe this approach is the right first step for the profession. Unfortunately, the current iteration of the bill is overly broad and poses significant practice and safety concerns. As amended on June 20, 2018, AB 3110 substantially expands the definition of "athletic activity" to the point that virtually anyone could be considered an "athlete." This modification would allow athletic trainers to treat any person at any location – a broad expansion of ATs' scope practice beyond their education and training.

We also continue to have concerns with the definition of "athletic training" and the physician supervision requirements as well. We believe the inclusion of "illness prevention" is overly broad and should be restricted to include only "risk management and injury prevention." Each setting included in the "athletic training" definition should be limited by its application to an "athlete." The ability of an athletic trainer to use "commercial products" is overly broad and could be interpreted to include the provision of medications beyond an athletic trainer's education and training.

With respect to the physician supervision requirements and protocols set forth in the bill, the implementation of such protocols should be subject to a pre-screening of the athlete by their treating physician rather than a general protocol that is non-specific to each athlete. Furthermore, working by direction of a protocol when no physician is present or without the athlete being pre-screened will effectively require the athletic trainer to diagnose an individual's condition in order to apply the correct treatment protocol. The ability to diagnose is well outside the scope and training of an athletic trainer.

For these reasons, we must continue to oppose AB 3110. If you have any questions, please contact Ivan Altamura with Capitol Advocacy at (916) 444-0400 or ialtamura@capitoladvocacy.com.

Sincerely,

Heather J. Kitching, OTD, OTR/L
OTAC President

Chuck Willmarth
Director of State Affairs, AOTA

cc: The Honorable Kevin Mullin, Author
Members, Senate Business, Professions & Economic Development Committee
Sarah Mason, Consultant, Senate Business, Professions & Economic Development Committee
Kayla Williams, Senate Republican Caucus



Occupational Therapy Association of California

Appropriations Committee



Occupational Therapy Association of California

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](#)

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.

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 defeated 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 reheard until a subsequent committee meeting is held and after being calendared in the Daily File and after 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.

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.

AB 2221-OT Practice Act Modernization

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

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

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.

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.

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.

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.”

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.

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.

AB 2221-OT Practice Act Modernization

CALL TO ACTION AB 2221

Support Modernization of the OT Practice Act

About the Bill. An OTAC sponsored bill this legislative session, AB 2221, provides necessary updates to the Occupational Therapy Practice Act. This bill would 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, as well as changes to continuing competence requirements. To read this bill in its current form, please see: http://leginfo.ca.gov/faces/billNavClient.xhtml?bill_id=201720180AB2221.

Bill Status. AB 2221 has passed the Senate Business, Professions, & Economic Development (B., P., & E.D.) Committee and will now be heard in the Senate Appropriations Committee. The bill must be heard by Friday, August 17th.

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 show of support for this bill as it proceeds through legislation. A template letter and instructions have been posted on www.otaconline.org. Submit letter by Friday, August 10th at 5:00 p.m. to execdir@otaconline.org.

Call the Committee Members. Representatives want to hear from the individuals the bill will affect, especially if you are one their constituents. Please contact your Senator by **Thursday, August 16th** to show your support. Listed below are the Senators on the Senate Appropriations Committee, their districts, and their contact information. Sample language to demonstrate your support may include:

Name, credential (OT, OTA, OTS), and "I support AB 2221, the Occupational Therapy Practice Act Modernization. The OT Practice Act has not been updated since its inception in 2000 and these changes are much needed to reflect the current practice of occupational therapy. Thank you."



Occupational Therapy Association of California

AB 2221-OT Practice Act Modernization

SENATE APPROPRIATIONS			
Member	District	Party	Phone
Committee Staff			916 651 4101
Portantino, Anthony (Chair) <i>La Canada Flintridge</i>	25	D	916 651 4025
Bates, Patricia (Vice Chair) <i>Laguna Niguel</i>	36	R	916 651 4036
Beall, Jim <i>San Jose</i>	15	D	916 651 4015
Bradford, Steven <i>Gardena</i>	35	D	916 651 4035
Hill, Jerry <i>San Mateo</i>	13	D	916 651 4013
Nielson, Jim <i>Red Bluff</i>	4	R	916 651 4004
Wiener, Scott <i>San Francisco</i>	11	D	916 651 4011

AB 2386 - OT and PT Services Credential in Public Schools

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.

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.

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.

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.

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.

GO-TO-OT Events



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 12th.

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.

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 September 1st.*

GO-TO-OT Events

 <p>OTAC 2018 Annual Conference & Expo October 25-28, 2018 - Hilton Pasadena & Pasadena Convention Center</p> <p>Conference Website</p> <p>Hotel Reservations</p>	<p>OT Coffee Meet-Up: Learn What's New in OT Advocacy Activities</p> <p>Hosted By Lauren Heflin, MA, OTR/L</p>  <p>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 elected legislators to educate them</p>
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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.

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

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.

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

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

Legislator Name(s):

Purpose of Legislative Meeting/Legislative Event:

Meeting/Event Location:

Meeting/Event Date(s):

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 Polastri: karen@otaonline.org and Sabrena McCarley: gachr@otaonline.org within 3 business days from meeting attendance.



Advocacy in Action





OTAC

Occupational Therapy Association of California



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>).
- **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/>).
- **Internet.** You can support advocacy by listening to hearings, floor sessions, and press conferences over the Internet. Senate (<https://www.senate.ca.gov/calendar>). Assembly (<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/>).

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).
 - 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>).

Available Fact Sheets

- Tips for Building Effectuated 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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- **Political advocacy articles from other disciplines:**
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