

AGENDA ITEM 19

**PRESENTATION FROM THE DEPARTMENT OF CONSUMER
AFFAIRS' BUDGET OFFICE.**

Department of Consumer Affairs
Revenue Projection Report

Reporting Structure(s): 11112400 Support
Fiscal Month:
Fiscal Year: 2024 - 2025
Run Date: 05/28/2025

Revenue																
Fiscal Code	Line Item	Budget	July	August	September	October	November	December	January	February	March	April	May	June	Year to Date	Projection To Year End
	Delinquent Fees	\$49,000	\$4,065	\$3,855	\$5,475	\$3,795	\$4,170	\$4,485	\$5,115	\$4,890	\$3,000	\$4,185	\$4,000	\$3,745	\$43,035	\$50,780
	Other Regulatory Fees	\$56,000	\$10,870	\$5,140	\$3,395	\$2,825	\$4,210	\$4,104	\$3,105	\$7,391	\$13,589	\$13,303	\$4,550	\$3,475	\$67,932	\$75,957
	Other Regulatory License and Permits	\$476,000	\$38,838	\$41,442	\$38,843	\$39,046	\$34,201	\$28,108	\$31,926	\$30,669	\$34,183	\$36,752	\$37,900	\$30,075	\$354,008	\$421,983
	Other Revenue	\$99,000	\$3,186	\$2,800	\$2,783	\$24,466	\$2,055	\$2,408	\$24,129	\$3,045	\$2,220	\$22,426	\$2,450	\$2,250	\$89,519	\$94,219
	Renewal Fees	\$2,567,000	\$247,230	\$315,270	\$407,751	\$230,670	\$198,810	\$206,340	\$248,520	\$197,400	\$229,920	\$214,180	\$122,790	\$63,400	\$2,496,091	\$2,682,281
	Revenue	\$3,247,000	\$304,189	\$368,507	\$458,247	\$300,802	\$243,446	\$245,445	\$312,795	\$243,395	\$282,912	\$290,846	\$171,690	\$102,945	\$3,050,585	\$3,325,220

Reimbursements																
Fiscal Code	Line Item	Budget	July	August	September	October	November	December	January	February	March	April	May	June	Year to Date	Projection To Year End
	Scheduled Reimbursements	\$0	\$3,185	\$3,234	\$2,744	\$3,430	\$2,156	\$2,156	\$2,744	\$2,205	\$2,940	\$2,450	\$2,000	\$2,000	\$27,244	\$31,244
	Unscheduled Reimbursements	\$0	\$600	\$600	\$250	\$400	\$1,200	\$1,709	\$2,409	\$1,713	\$2,979	\$4,119	\$600	\$700	\$15,980	\$17,280
	Reimbursements	\$0	\$3,785	\$3,834	\$2,994	\$3,830	\$3,356	\$3,865	\$5,153	\$3,918	\$5,919	\$6,569	\$2,600	\$2,700	\$43,224	\$48,524

Department of Consumer Affairs
 Expenditure Projection Report
 California Board of Occupational Therapy
 Reporting Structure(s): 11112400 Support
 Fiscal Month: 10
 Fiscal Year: 2024 - 2025
 Run Date: 05/27/2025

PERSONAL SERVICES

Fiscal Code	Line Item	PY Budget	PY FM13	Budget	Current Month	YTD	Encumbrance	YTD + Encumbrance	Projections to Year End	Balance
5100	PERMANENT POSITIONS	\$1,200,000	\$991,557	\$1,084,000	\$92,440	\$891,816	\$0	\$891,816	\$1,066,108	\$17,892
5100	TEMPORARY POSITIONS	\$4,000	\$112,883	\$4,000	\$59,674	\$178,940	\$0	\$59,674	\$68,531	-\$64,531
5105-5108	PER DIEM, OVERTIME, & LUMP SUM	\$20,000	\$13,899	\$20,000	\$1,100	\$10,047	\$0	\$10,047	\$132,383	-\$112,383
5150	STAFF BENEFITS	\$783,000	\$601,619	\$709,000	\$54,605	\$576,626	\$0	\$576,626	\$687,619	\$21,381
	PERSONAL SERVICES	\$2,007,000	\$1,719,958	\$1,817,000	\$233,165	\$1,657,429	\$0	\$1,657,429	\$1,954,641	-\$137,641

OPERATING EXPENSES & EQUIPMENT

Fiscal Code	Line Item	PY Budget	PY FM13	Budget	Current Month	YTD	Encumbrance	YTD + Encumbrance	Projections to Year End	Balance
5301	GENERAL EXPENSE	\$59,000	\$36,792	\$73,000	\$3,042	\$31,193	\$525	\$31,718	\$38,960	\$34,040
5302	PRINTING	\$19,000	\$22,924	\$35,000	\$1,147	\$3,908	\$14,195	\$18,103	\$8,103	\$26,897
5304	COMMUNICATIONS	\$14,000	\$2,930	\$14,000	\$30	\$1,466	\$0	\$1,466	\$1,701	\$12,299
5306	POSTAGE	\$18,000	\$6,620	\$18,000	\$0	\$10,884	\$0	\$10,884	\$12,328	\$5,672
5308	INSURANCE	\$0	\$32	\$0	\$0	\$23	\$0	\$23	\$23	-\$23
53202-204	IN STATE TRAVEL	\$25,000	\$22,256	\$25,000	\$6,682	\$24,740	\$0	\$24,740	\$29,688	-\$4,688
5322	TRAINING	\$9,000	\$5,850	\$9,000	\$0	\$0	\$0	\$0	\$0	\$9,000
5324	FACILITIES	\$147,000	\$145,813	\$147,000	\$12,028	\$119,355	\$23,628	\$142,983	\$148,798	-\$1,798
53402-53403	C/P SERVICES (INTERNAL)	\$243,000	\$214,995	\$340,000	\$39,600	\$258,904	\$0	\$258,904	\$356,446	-\$16,446
53404-53405	C/P SERVICES (EXTERNAL)	\$58,000	\$59,263	\$116,000	\$252	\$24,717	\$10,022	\$34,739	\$29,351	\$86,649
5342	DEPARTMENT PRORATA	\$752,000	\$649,611	\$700,000	\$0	\$606,666	\$0	\$606,666	\$700,000	\$0
5342	DEPARTMENTAL SERVICES	\$0	\$770	\$0	\$184	\$582	\$0	\$582	\$791	-\$791
5344	CONSOLIDATED DATA CENTERS	\$14,000	\$25,154	\$14,000	\$0	\$0	\$0	\$0	\$10,636	\$3,364
5346	INFORMATION TECHNOLOGY	\$4,000	\$185	\$4,000	\$7,217	\$19,147	\$100	\$19,247	\$22,945	-\$18,945
5362-5368	EQUIPMENT	\$4,000	\$3,286	\$22,000	\$3,932	\$3,932	\$4,241	\$8,173	\$18,275	\$3,725
5390	OTHER ITEMS OF EXPENSE	\$0	\$60	\$0	\$0	\$0	\$0	\$0	\$0	\$0
54	SPECIAL ITEMS OF EXPENSE	\$0	\$1,559	\$0	\$273	\$419	\$0	\$419	\$837	-\$837
	OPERATING EXPENSES & EQUIPMENT	\$1,366,000	\$1,198,098	\$1,517,000	\$74,385	\$1,105,936	\$52,711	\$1,158,647	\$1,378,883	\$138,117

OVERALL TOTALS	\$3,373,000	\$2,918,056	\$3,334,000	\$318,821	\$2,455,815	\$111,417	\$2,567,233	\$3,333,524	\$476
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REIMBURSEMENTS	-\$22,000	-\$42,593	-\$22,000					-\$22,000	
OVERALL TOTALS	\$3,373,000	\$2,918,056	\$3,312,000	\$307,550	\$2,763,365	\$52,711	\$2,816,076	\$3,311,524	\$476

0.01%

3017 - Board of Occupational Therapy Fund**Analysis of Fund Condition****(Dollars in Thousands)****2025-26 Revised Governor's Budget w/FM 10 Projections****Prepared 5.29.2025**

	Actuals 2023-24	CY 2024-25	BY 2025-26	BY +1 2026-27	BY +2 2027-28
BEGINNING BALANCE	\$ 1,478	\$ 1,505	\$ 1,305	\$ 1,176	\$ 952
Prior Year Adjustment	\$ 11	\$ -	\$ -	\$ -	\$ -
Adjusted Beginning Balance	\$ 1,489	\$ 1,505	\$ 1,305	\$ 1,176	\$ 952
REVENUES, TRANSFERS AND OTHER ADJUSTMENTS					
Revenues					
4121200 - Delinquent fees	\$ 48	\$ 51	\$ 49	\$ 49	\$ 49
4127400 - Renewal fees	\$ 2,497	\$ 2,682	\$ 2,599	\$ 2,599	\$ 2,599
4129200 - Other regulatory fees	\$ 56	\$ 76	\$ 55	\$ 55	\$ 55
4129400 - Other regulatory licenses and permits	\$ 466	\$ 422	\$ 486	\$ 486	\$ 486
4143500 - Miscellaneous Services to the Public	\$ 31	\$ 29	\$ 32	\$ 32	\$ 32
4163000 - Income from surplus money investments	\$ 75	\$ 64	\$ 37	\$ 14	\$ 9
4171400 - Escheat of unclaimed checks and warrants	\$ -	\$ 1	\$ 1	\$ 1	\$ 1
Totals, Revenues	\$ 3,173	\$ 3,325	\$ 3,259	\$ 3,236	\$ 3,231
TOTALS, REVENUES, TRANSFERS AND OTHER ADJUSTMENTS	\$ 3,173	\$ 3,325	\$ 3,259	\$ 3,236	\$ 3,231
TOTAL RESOURCES	\$ 4,662	\$ 4,830	\$ 4,564	\$ 4,412	\$ 4,183
Expenditures:					
1111 Department of Consumer Affairs (State Operations)	\$ 2,875	\$ 3,291	\$ 3,145	\$ 3,239	\$ 3,337
9892 Supplemental Pension Payments (State Operations)	\$ 42	\$ 22	\$ 22		
9900 Statewide General Administrative Expenditures (Pro Rata) (State Operations)	\$ 240	\$ 212	\$ 221	\$ 221	\$ 221
TOTALS, EXPENDITURES AND EXPENDITURE ADJUSTMENTS	\$ 3,157	\$ 3,525	\$ 3,388	\$ 3,460	\$ 3,558
FUND BALANCE					
Reserve for economic uncertainties	\$ 1,505	\$ 1,305	\$ 1,176	\$ 952	\$ 625
Months in Reserve	5.1	4.6	4.1	3.2	2.1

NOTES:

1. Assumes workload and revenue projections are realized in BY+1 and ongoing.
2. Expenditure growth projected at 3% beginning BY+1.

AGENDA ITEM 20

CONSIDERATION AND POSSIBLE ACTION TO INITIATE A RULEMAKING PACKAGE TO AMEND CALIFORNIA CODE OF REGULATIONS, TITLE 16, DIVISION 39, ARTICLE 4, SECTION 4130, FEES.

INCLUDES THE FOLLOWING:

- 20.1 HOURLY RATE CALCULATIONS.
- 20.2 LICENSE RENEWAL WORKLOAD.
- 20.3 PROPOSED LANGUAGE TO INCREASE LICENSE RENEWAL FEES.

California Board of Occupational Therapy OT & OTA License Renewal - Business and Professions Code 2570.16 (Workload Costs)				
Workload Tasks	Per Application	Minutes Per Application	OT	SSA
Application received, processed & distributed	1	10	10	-
Cashiering - Input into IT systems & prepare trial balance	1	10	10	-
Initial review of application & identify deficiencies	1	20	-	20
Deficiency letters sent, if applicable	0.5	10	10	-
Continuing Education (CE) review	1	30	15	15
Communication - email, phone, etc.	1	30	15	15
Mailing receipts upon request	1	15	15	-
Prepare & issue license	1	15	15	-
Minutes per Classification			90	50
Hours by Classification			1.5	0.8
Costs by Classification			\$143	\$89
Enforcement-Cost Allocation			\$80	
Total Costs:			\$312	

OT - Office Technician (\$95/hr - includes DCA Distributed Admin)

SSA - Associate Governmental Program Analyst (\$107/hr - includes DCA Distributed Admin)

Stat Cap
\$300

3017 - Board of Occupational Therapy Fund
Analysis of Fund Condition
(Dollars in Thousands)

Prepared 6.3.2025

2025-26 May Revision (Status Quo)	Actuals	FM 10		BY	BY +1	BY +2	BY +3	BY +4	BY +5
	2023-24	CY	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31
BEGINNING BALANCE	\$ 1,478	\$ 1,505	\$ 1,305	\$ 1,176	\$ 952	\$ 625	\$ 192	\$ -346	
Prior Year Adjustment	\$ 11	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Adjusted Beginning Balance	\$ 1,489	\$ 1,505	\$ 1,305	\$ 1,176	\$ 952	\$ 625	\$ 192	\$ -346	
REVENUES, TRANSFERS AND OTHER ADJUSTMENTS									
Revenues									
4121200 - Delinquent fees	\$ 48	\$ 51	\$ 49	\$ 49	\$ 49	\$ 49	\$ 49	\$ 49	\$ 49
4127400 - Renewal fees	\$ 2,497	\$ 2,682	\$ 2,599	\$ 2,599	\$ 2,599	\$ 2,599	\$ 2,599	\$ 2,599	\$ 2,599
4129200 - Other regulatory fees	\$ 56	\$ 76	\$ 55	\$ 55	\$ 55	\$ 55	\$ 55	\$ 55	\$ 55
4129400 - Other regulatory licenses and permits	\$ 466	\$ 422	\$ 486	\$ 486	\$ 486	\$ 486	\$ 486	\$ 486	\$ 486
4143500 - Miscellaneous Services to the Public	\$ 31	\$ 29	\$ 32	\$ 32	\$ 32	\$ 32	\$ 32	\$ 32	\$ 32
4163000 - Income from surplus money investments	\$ 75	\$ 64	\$ 37	\$ 14	\$ 9	\$ 3	\$ -	\$ -	\$ -
4171400 - Escheat of unclaimed checks and warrants	\$ -	\$ 1	\$ 1	\$ 1	\$ 1	\$ 1	\$ 1	\$ 1	\$ 1
Totals, Revenues	\$ 3,173	\$ 3,325	\$ 3,259	\$ 3,236	\$ 3,231	\$ 3,225	\$ 3,222	\$ 3,222	\$ 3,222
TOTALS, REVENUES, TRANSFERS AND OTHER ADJUSTMENTS	\$ 3,173	\$ 3,325	\$ 3,259	\$ 3,236	\$ 3,231	\$ 3,225	\$ 3,222	\$ 3,222	\$ 3,222
TOTAL RESOURCES	\$ 4,662	\$ 4,830	\$ 4,564	\$ 4,412	\$ 4,183	\$ 3,850	\$ 3,414	\$ 2,876	
Expenditures:									
1111 Department of Consumer Affairs (State Operations)	\$ 2,875	\$ 3,291	\$ 3,145	\$ 3,239	\$ 3,337	\$ 3,437	\$ 3,540	\$ 3,646	
9892 Supplemental Pension Payments (State Operations)	\$ 42	\$ 22	\$ 22	\$ -	\$ -	\$ -	\$ -	\$ -	
9900 Statewide General Administrative Expenditures (Pro Rata) (State Operations)	\$ 240	\$ 212	\$ 221	\$ 221	\$ 221	\$ 221	\$ 221	\$ 221	
TOTALS, EXPENDITURES AND EXPENDITURE ADJUSTMENTS	\$ 3,157	\$ 3,525	\$ 3,388	\$ 3,460	\$ 3,558	\$ 3,658	\$ 3,761	\$ 3,867	
FUND BALANCE									
Reserve for economic uncertainties	\$ 1,505	\$ 1,305	\$ 1,176	\$ 952	\$ 625	\$ 192	\$ -346	\$ -991	
Months in Reserve	5.1	4.6	4.1	3.2	2.1	0.6	-1.1	-3.1	

- NOTES:
- 1. Assumes workload and revenue projections are realized in CY and ongoing.
 - 2. Expenditure growth projected at 3% beginning BY+1.

3017 - Board of Occupational Therapy Fund
Analysis of Fund Condition
(Dollars in Thousands)

Prepared 6.3.2025

2025-26 May Revision (OT @ \$300; OTA @ \$240)	FM 10							
	Actuals 2023-24	CY 2024-25	BY 2025-26	BY +1 2026-27	BY +2 2027-28	BY +3 2028-29	BY +4 2029-30	BY +5 2030-31
BEGINNING BALANCE	\$ 1,478	\$ 1,505	\$ 1,305	\$ 1,176	\$ 1,277	\$ 1,280	\$ 1,181	\$ 976
Prior Year Adjustment	\$ 11	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Adjusted Beginning Balance	\$ 1,489	\$ 1,505	\$ 1,305	\$ 1,176	\$ 1,277	\$ 1,280	\$ 1,181	\$ 976
REVENUES, TRANSFERS AND OTHER ADJUSTMENTS								
Revenues								
4121200 - Delinquent fees	\$ 48	\$ 51	\$ 49	\$ 49	\$ 49	\$ 49	\$ 49	\$ 49
4127400 - Renewal fees	\$ 2,497	\$ 2,682	\$ 2,599	\$ 2,599	\$ 2,599	\$ 2,599	\$ 2,599	\$ 2,599
4127400 - Renewal fees increase (eff. 7/1/2026)	\$ -	\$ -	\$ -	\$ 302	\$ 302	\$ 302	\$ 302	\$ 302
4129200 - Other regulatory fees	\$ 56	\$ 76	\$ 55	\$ 55	\$ 55	\$ 55	\$ 55	\$ 55
4129400 - Other regulatory licenses and permits	\$ 466	\$ 422	\$ 486	\$ 486	\$ 486	\$ 486	\$ 486	\$ 486
4129400 - Other regulatory licenses and permits increase (eff. 7/1/2026)	\$ -	\$ -	\$ -	\$ 42	\$ 42	\$ 42	\$ 42	\$ 42
4143500 - Miscellaneous Services to the Public	\$ 31	\$ 29	\$ 32	\$ 32	\$ 32	\$ 32	\$ 32	\$ 32
4163000 - Income from surplus money investments	\$ 75	\$ 64	\$ 37	\$ 19	\$ 19	\$ 17	\$ 14	\$ 10
4171400 - Escheat of unclaimed checks and warrants	\$ -	\$ 1	\$ 1	\$ 1	\$ 1	\$ 1	\$ 1	\$ 1
Totals, Revenues	\$ 3,173	\$ 3,325	\$ 3,259	\$ 3,585	\$ 3,585	\$ 3,583	\$ 3,580	\$ 3,576
TOTALS, REVENUES, TRANSFERS AND OTHER ADJUSTMENTS	\$ 3,173	\$ 3,325	\$ 3,259	\$ 3,585	\$ 3,585	\$ 3,583	\$ 3,580	\$ 3,576
TOTAL RESOURCES	\$ 4,662	\$ 4,830	\$ 4,564	\$ 4,761	\$ 4,862	\$ 4,863	\$ 4,761	\$ 4,552
Expenditures:								
1111 Department of Consumer Affairs (State Operations)	\$ 2,875	\$ 3,291	\$ 3,145	\$ 3,239	\$ 3,337	\$ 3,437	\$ 3,540	\$ 3,646
9892 Supplemental Pension Payments (State Operations)	\$ 42	\$ 22	\$ 22	\$ -	\$ -	\$ -	\$ -	\$ -
9900 Statewide General Administrative Expenditures (Pro Rata) (State Operations)	\$ 240	\$ 212	\$ 221	\$ 245	\$ 245	\$ 245	\$ 245	\$ 245
TOTALS, EXPENDITURES AND EXPENDITURE ADJUSTMENTS	\$ 3,157	\$ 3,525	\$ 3,388	\$ 3,484	\$ 3,582	\$ 3,682	\$ 3,785	\$ 3,891
FUND BALANCE								
Reserve for economic uncertainties	\$ 1,505	\$ 1,305	\$ 1,176	\$ 1,277	\$ 1,280	\$ 1,181	\$ 976	\$ 661
Months in Reserve	5.1	4.6	4.1	4.3	4.2	3.7	3.0	2.0

NOTES:

1. Assumes workload and revenue projections are realized in CY and ongoing.
2. Expenditure growth projected at 3% beginning BY+1.

3017 - Board of Occupational Therapy Fund
Analysis of Fund Condition
(Dollars in Thousands)

Prepared 6.3.2025

2025-26 May Revision (w/ renewal fees @ caps)	FM 10							
	Actuals 2023-24	CY 2024-25	BY 2025-26	BY +1 2026-27	BY +2 2027-28	BY +3 2028-29	BY +4 2029-30	BY +5 2030-31
BEGINNING BALANCE	\$ 1,478	\$ 1,505	\$ 1,305	\$ 1,176	\$ 1,411	\$ 1,550	\$ 1,589	\$ 1,526
Prior Year Adjustment	\$ 11	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Adjusted Beginning Balance	\$ 1,489	\$ 1,505	\$ 1,305	\$ 1,176	\$ 1,411	\$ 1,550	\$ 1,589	\$ 1,526
REVENUES, TRANSFERS AND OTHER ADJUSTMENTS								
Revenues								
4121200 - Delinquent fees	\$ 48	\$ 51	\$ 49	\$ 49	\$ 49	\$ 49	\$ 49	\$ 49
4127400 - Renewal fees	\$ 2,497	\$ 2,682	\$ 2,599	\$ 2,599	\$ 2,599	\$ 2,599	\$ 2,599	\$ 2,599
4127400 - Renewal fees increase (eff. 7/1/2026)	\$ -	\$ -	\$ -	\$ 425	\$ 425	\$ 425	\$ 425	\$ 425
4129200 - Other regulatory fees	\$ 56	\$ 76	\$ 55	\$ 55	\$ 55	\$ 55	\$ 55	\$ 55
4129400 - Other regulatory licenses and permits	\$ 466	\$ 422	\$ 486	\$ 486	\$ 486	\$ 486	\$ 486	\$ 486
4129400 - Other regulatory licenses and permits increase (eff. 7/1/2026)	\$ -	\$ -	\$ -	\$ 61	\$ 61	\$ 61	\$ 61	\$ 61
4143500 - Miscellaneous Services to the Public	\$ 31	\$ 29	\$ 32	\$ 32	\$ 32	\$ 32	\$ 32	\$ 32
4163000 - Income from surplus money investments	\$ 75	\$ 64	\$ 37	\$ 21	\$ 23	\$ 23	\$ 23	\$ 20
4171400 - Escheat of unclaimed checks and warrants	\$ -	\$ 1	\$ 1	\$ 1	\$ 1	\$ 1	\$ 1	\$ 1
Totals, Revenues	\$ 3,173	\$ 3,325	\$ 3,259	\$ 3,729	\$ 3,731	\$ 3,731	\$ 3,731	\$ 3,728
TOTALS, REVENUES, TRANSFERS AND OTHER ADJUSTMENTS	\$ 3,173	\$ 3,325	\$ 3,259	\$ 3,729	\$ 3,731	\$ 3,731	\$ 3,731	\$ 3,728
TOTAL RESOURCES	\$ 4,662	\$ 4,830	\$ 4,564	\$ 4,905	\$ 5,142	\$ 5,281	\$ 5,320	\$ 5,254
Expenditures:								
1111 Department of Consumer Affairs (State Operations)	\$ 2,875	\$ 3,291	\$ 3,145	\$ 3,239	\$ 3,337	\$ 3,437	\$ 3,540	\$ 3,646
9892 Supplemental Pension Payments (State Operations)	\$ 42	\$ 22	\$ 22	\$ -	\$ -	\$ -	\$ -	\$ -
9900 Statewide General Administrative Expenditures (Pro Rata) (State Operations)	\$ 240	\$ 212	\$ 221	\$ 255	\$ 255	\$ 255	\$ 255	\$ 255
TOTALS, EXPENDITURES AND EXPENDITURE ADJUSTMENTS	\$ 3,157	\$ 3,525	\$ 3,388	\$ 3,494	\$ 3,592	\$ 3,692	\$ 3,795	\$ 3,901
FUND BALANCE								
Reserve for economic uncertainties	\$ 1,505	\$ 1,305	\$ 1,176	\$ 1,411	\$ 1,550	\$ 1,589	\$ 1,526	\$ 1,353
Months in Reserve	5.1	4.6	4.0	4.7	5.0	5.0	4.7	4.2

NOTES:

1. Assumes workload and revenue projections are realized in CY and ongoing.
2. Expenditure growth projected at 3% beginning BY+1.

Proposed Amendments to CCR Section 4130

§ 4130. Fees

Fees are fixed by the board as follows:

- (a) The fee for processing an Initial Application for Licensure (Form ILA, Revised 7/2016) shall be fifty dollars (\$50).
- (b) The initial license fee for occupational therapists shall be prorated pursuant to Section 4120(a)(1) and based on the biennial renewal fee set forth below.
- (c) The initial license fee for occupational therapy assistants shall be prorated pursuant to Section 4120(a)(1) and based on a the biennial renewal fee set forth below.
- (d) The fee for a limited permit shall be one hundred dollars (\$100).
- (e) The biennial renewal fee for occupational therapists shall be two hundred twenty dollars (\$220). For licenses that expire on or after January 1, 2021, but before July 1, 2026, the biennial renewal fee shall be two hundred seventy dollars (\$270). For licenses that expire on or after July 1, 2026, the biennial renewal fee shall be three hundred dollars (\$300).
- (f) The biennial renewal fee for occupational therapy assistants shall be one hundred eighty dollars (\$180). For licenses that expire on or after January 1, 2021, but before July 1, 2026, the biennial renewal fee shall be two hundred ten dollars (\$210). For licenses that expire on or after July 1, 2026, the biennial renewal fee shall be two hundred forty dollars (\$240).
- (g) The delinquency fee is one-half of the renewal fee.
- (h) The biennial renewal fee for an inactive license shall be the same as the biennial renewal fee for an active license.
- (i) The fee for an [Application for Retired Status](#) (Form ARS, New 7/2012), shall be twenty-five dollars (\$25).
- (j) The fee for a duplicate license shall be twenty five dollars (\$25).
- (k) The fees for fingerprint services are those charged by the California Department of Justice and the Federal Bureau of Investigation.

Note: Authority cited: Sections 122, 144, 163.5, and 2570.20, Business and Professions Code.

Reference: Sections 134, 144, 161, 462, 703, 2570.5, 2570.9, 2570.10, 2570.11, 2570.16, and 2570.17, Business and Professions Code.

AGENDA ITEM 21

CONSIDERATION AND POSSIBLE ACTION TO INITIATE A RULEMAKING PACKAGE TO AMEND CALIFORNIA CODE OF REGULATIONS, TITLE 16, DIVISION 39, ARTICLE 6, SECTION 4161, CONTINUING COMPETENCY.

INCLUDES THE FOLLOWING:

- 21.1 MEMORANDUM.
- 21.2 PROPOSED LANGUAGE TO IMPLEMENT A JURISPRUDENCE
CONTINUING COMPETENCY REQUIREMENT.



MEMORANDUM

DATE	June 3, 2025
TO	Board of Occupational Therapy Members
FROM	Austin Porter, Executive Officer Board of Occupational Therapy
SUBJECT	Agenda Item 21: Consideration and Possible Action to Initiate a Rulemaking Package to Amend California Code of Regulations, Title 16, Division 39, Article 7, Section 4161, Continuing Competency.

Background

The Board currently has a rulemaking package in-process that would amend CCR Section 4161, Continuing Competency. This rulemaking package would also make amendments to CCR Sections 4102, Filing of Addresses, 4150, Definitions, 4151, Hand Therapy, 4152, Physical Agent Modalities, 4153, Swallowing Assessment, Evaluation, or Intervention, 4154, Education and Training, and 4162, Completion and Reporting Requirements. This package, which was submitted in August of 2023, has not yet obtained legal or budgetary approval.

Furthermore, the approved text for Section 4161 would make effective additional continuing competency requirements as of January 1, 2025. This effective date must be updated to prevent retroactively imposing requirements on license renewals after the package is approved.

In addition, as a result of its Strategic Planning session in January of 2024 and discussion at its March 2024 meeting, the Board has expressed interest in implementing a jurisprudence continuing competency requirement in order to ensure licensees' familiarity with the laws and regulations pertaining to the practice of occupational therapy in California.

Thus, the text before the Board today would make 2 types of changes to CCR Section 4161:

- Changes that were previously approved by the Board and are a part of the 2023 rulemaking package, which include
 - Implementation of ethics and culturally relevant practice requirements for continuing competency,
 - Removal of the term “post-professional,”
 - Acceptance of Doctoral Capstone student supervision for continuing competency credit,
 - Requirement of 12 professional development units for those licensees whose first renewal occurs more than 1 year after issuance of their initial license.
- Newly proposed changes, which include
 - Implementation of a jurisprudence requirement for continuing competency,
 - Clarification regarding the use of attendance at certain Board meetings for continuing competency credit.

Action Requested

The purpose of the proposed rulemaking package before the Board today is threefold:

1. To separate the changes to CCR Section 4161 from the 2023 package to simplify the legal and budgetary approval process and move the package forward;
2. To update the effective date of proposed, additional continuing competency requirements; and
3. To consider additional changes which have been proposed since the 2023 package.

Board staff asks that the Board consider the newly proposed changes and vote on initiation of a new rulemaking package to make amendments to CCR Section 4161.

Included Materials

- Proposed text to amend CCR Section 4161.

*Neither this memo nor the included materials have been reviewed by regulatory counsel.

DEPARTMENT OF CONSUMER AFFAIRS

Title 16, Division 39, California Code of Regulations. California Board of Occupational Therapy

PROPOSED REGULATORY LANGUAGE

Continuing Competency

Legend:	Added text is indicated with an <u>underline</u> . Omitted text is indicated by (* * * *) Deleted text is indicated by strikeout .
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Amend section 4161 of Division 39, Title 16 of the California Code of Regulations to read as follows:

§ 4161. Continuing Competency

(a) Each licensee renewing a license under Section 2570.10 of the Code shall submit evidence of meeting continuing competency requirements by having completed 24 professional development units (PDUs) during the preceding renewal period, or in the case of a license delinquently renewed, within the two years immediately preceding the renewal, acquired through participation in professional development activities.

(1) One hour of participation in a professional development activity qualifies for one PDU;

(2) One academic credit equals 10 PDUs;

(3) One Continuing Education Unit (CEU) equals 10 PDUs.

(b) [Insert either option one or option two from below.]

~~(b)~~ (c) Topics and subject matter shall be pertinent to the practice of occupational therapy and course material must have a relevance or direct application to a consumer of occupational therapy services. Except as provided in subdivision ~~(e)~~ (d), professional development activities acceptable to the board include programs or activities sponsored by the American Occupational Therapy Association (AOTA) or the Occupational Therapy Association of California; ~~post-professional~~ coursework completed through any approved or accredited educational institution, or otherwise meets all of the following criteria:

(1) The program or activity contributes directly to professional knowledge, skill, and ability; and

(2) The program or activity must be objectively measurable in terms of the hours involved.

~~(e)~~ (d) PDUs may also be obtained through any or a combination of the following:

(1) Involvement in structured special interest or study groups with a minimum of three participants. Three hours of participation equals one PDU, with a maximum of six PDUs credited per renewal period.

- (2) Structured mentoring with an individual skilled in a particular area. For each 20 hours of being mentored, the practitioner will earn three PDUs, with a maximum of six PDUs credited per renewal period.
- (3) Structured mentoring of a colleague to improve his/her skills. Twenty hours of mentoring equals three PDUs, with a maximum of six PDUs credited per renewal period.
- (4) Supervising the fieldwork of Level I, ~~and Level II, or Doctoral Capstone~~ occupational therapist and occupational therapy assistant students shall be credited as follows:
- (A) Supervising the fieldwork of a Level I student. For each student supervised the practitioner will receive one PDU.
- (B) Supervising the fieldwork of a Level II student. For each 40 hours of supervision the practitioner will receive one PDU.
- (C) Supervising a Doctoral Capstone student. For each 40 hours of supervision the practitioner will receive one PDU.
- ~~(C) (D)~~ (D) A maximum of 12 PDUs of credit for supervising Level II, ~~and/or Level I, or Doctoral Capstone~~ students shall be allowed per renewal period.
- ~~(D) (E)~~ (E) The supervision shall not be the primary responsibility of the licensee's employment.
- ~~(E) (F)~~ (F) Credit for PDUs shall only be earned for the dates of supervision occurring during the renewal period.
- ~~(F) (G)~~ (G) Fieldwork supervision hours of a single student may be divided between licensees. Total weekly hours claimed by more than one licensee sharing supervision of a single student shall not exceed 40 hours per week.
- (5) Publication of an article in a non-peer reviewed publication. Each article equals five PDUs, with a maximum of 10 PDUs credited per renewal period.
- (6) Publication of an article in a peer-reviewed professional publication. Each article equals 10 PDUs, with a maximum of 10 PDUs credited per renewal period.
- (7) Publication of chapter(s) in occupational therapy or related professional textbook. Each chapter equals 10 PDUs, with a maximum of 10 PDUs credited per renewal period.
- (8) Making professional presentations at workshops, seminars and conferences. For each hour presenting, the practitioner will earn two PDUs, with a maximum of six PDUs credited per renewal period.
- (9) Attending a meeting of the California Board of Occupational Therapy, except when that meeting's agenda states that attendance may not be used to earn PDUs. Each meeting attended equals two PDUs, with a maximum of six PDUs credited per renewal period.
- (10) Attending board outreach activities. Each presentation attended equals two PDUs, with a maximum of four PDUs credited per renewal period.
- ~~(d) (e)~~ (e) Partial credit will not be given for the professional development activities listed in subsection ~~(e) (d)~~ and a maximum of 12 PDUs may be credited for the activities listed in subsection ~~(e) (d)~~.
- ~~(e) (f)~~ (f) This section shall not apply to the first license renewal following issuance of the initial license occurring within one year of issuance of the initial license.
- (g) A licensee applying for the first license renewal occurring more than one year after the initial license was issued shall complete 12 PDUs.

~~(f)~~ (h) Of the total number of PDUs required for each renewal period, a minimum of one half of the units must be directly related to the delivery of occupational therapy services, which may include: models, theories, or frameworks that relate to client/patient care in preventing or minimizing impairment, enabling function within the person/environment or community context. Other activities may include, but are not limited to, occupation-based theory assessment/interview techniques, intervention strategies, and community/environment as related to one's practice.

~~(g)~~ (i) Applicants who have not been actively engaged in the practice of occupational therapy within the past five years completing continuing competency pursuant to section 2570.14(a) of the Code to qualify for licensure shall submit evidence of meeting the continuing competency requirements by having completed, during the two-year period immediately preceding the date the application was received, 40 PDUs that meet the requirements of subsection ~~(b)~~ (c). The 40 PDUs shall include:

(1) 37 PDUs directly related to the delivery of occupational therapy services, which may include the scope of practice for occupational therapy practitioners or the occupational therapy practice framework;

(2) Three PDUs related to ethical standards of practice in occupational therapy.

Note: Authority cited: Sections 2570.10 and 2570.20, Business and Professions Code.
Reference: Section 2570.10, Business and Professions Code.

Options for 4161.(b)

§ 4161.(b) – Option 1

(b) For a license renewed on or after January 1, 2027, of the 24 PDUs required for each renewal period, licensees must complete:

(1) A minimum of two units related to ethics in healthcare,

(2) One course pertaining to California Business and Professions Code, Division 2, Chapter 5.6, Occupational Therapy, and California Code of Regulations, Title 16, Division 39, and

(3) One course pertaining to culturally relevant practice, socio-cultural factors, working with diverse populations, and/or bias.

§ 4161.(b) – Option 2

(b) For a license renewed on or after January 1, 2027, of the 24 PDUs required for each renewal period, licensees must complete:

(1) One of the following:

(A) A minimum of two units related to ethics in healthcare, or

(B) One course pertaining to California Business and Professions Code, Division 2, Chapter 5.6, Occupational Therapy, and California Code of Regulations, Title 16, Division 39, and

(2) One course pertaining to culturally relevant practice, socio-cultural factors, working with diverse populations, and/or bias.

AGENDA ITEM 22

REPORT ON THE BOARD'S 2025 ACTION PLAN.



California Board of Occupational Therapy

2025-2030 Action Plan

Prepared by:

SOLID Planning Solutions

Department of Consumer Affairs

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Appendix: Acronyms	Error! Bookmark not defined.

Goal 1: Licensing

Objective 1.1

Review communication processes to identify efficiencies and other improvements.

Success Measure: Roadblocks identified, website updated, and automation implemented.

Due Date: Q2 2028

Task #	Task Description	Responsible Party	Due Date
1.1.1	Direct people to Board website. (Set expectations.)	Social Media Coordinator and All Staff	Q1 2025 and ongoing
1.1.2	Identify communication roadblocks.	Licensing Manager	Q1 2026 and ongoing
1.1.3	Update website with licensing processing time expectations.	BreEZe Liaison	Q2 2026
1.1.4	Explore BreEZe capabilities to send automatic notices or status updates. (Depends on Licensing Technician updating on a flow basis; maybe not yet.)	BreEZe Liaison	Q3 2027
1.1.5	Automate some communication (implementing BreEZe communications, etc.).	BreEZe Liaison	Q2 2028

Objective 1.2

Improve communication with applicants and licensees regarding the licensure process, requirements, and processing times.

Success Measure: Decreased time for deficiency resolution.

Due Date: Q1 2028

Task #	Task Description	Responsible Party	Due Date
1.2.1	Conduct outreach and education (regarding application process time frames) to schools using social media, professional associations.	Executive Officer	Q1 2025 and ongoing
1.2.2	Review and update License Requirement Checklist, make it more visible.	Licensing Manager	Q4 2025
1.2.3	Implement in-box for resolving delinquencies. Train licensing technicians.	BreEZe Liaison	Q3 2026
1.2.4	Develop a BreEZe how-to guide for licensees and for staff (show what consumer sees).	BreEZe Liaison	Q1 2028

Objective 1.3

Review licensing fees to balance fiscal responsibilities and reduce barriers to licensure.

Success Measure: Regulations package submitted, statutory language voted on.

Due Date: Q1 2028

Task #	Task Description	Responsible Party	Due Date
1.3.1	Conduct fee analysis for regulatory increases in fees.	Executive Officer	Q2 2025
1.3.2	Budget office presents to Board. Board votes on regulatory language.	Executive Officer	Q2 2025
1.3.3	Regulations package submitted.	Regulations Analyst	Q3 2025
1.3.4	Continue fee analysis for statutory change in fees.	Executive Officer	Q3 2026
1.3.5	Board votes on statutory language.	Executive Officer	Q1 2027
1.3.6	Put forth a bill.	Executive Officer	Q1 2028

Objective 1.4

Explore creating a law and ethics exam, or mandatory continuing education, to maintain licensee awareness of laws and regulations surrounding their profession and improve compliance.

Success Measure: Regulations package submitted, licensees informed.

Due Date: Q1 2027

Task #	Task Description	Responsible Party	Due Date
1.4.1	Board discussion on exam versus a continuing education (CE) requirement.	Executive Officer	Q1 2025
1.4.2	Work with Regulations Attorney for language on CE requirement.	Regulations Analyst, Executive Officer	Q3 2025
1.4.3	Board votes to implement CE requirement.	Executive Officer	Q3 2025
1.4.4	Work with professional associations to develop a CE course.	Licensing Manager	Q3 2026
1.4.5	Submit regulations package.	Regulations Analyst	Q4 2026
1.4.6	Inform licensees of CE requirement.	BreEZe Liaison, All Staff	Q1 2027 and ongoing

Goal 2: Enforcement

Objective 2.1

Evaluate and update the subject matter expert (SME) program to improve recruitment, training, retention, and diversity.

Success Measure: Increased number of SMEs.

Due Date: Q1 2027

Task #	Task Description	Responsible Party	Due Date
2.1.1	Develop an insert for advanced practice approval letters informing licensees about SME opportunity.	Enforcement Manager and Advanced Practice Analyst	Q4 2025
2.1.2	Explore offering CE credits to SMEs.	Enforcement Manager, Executive Officer	Q3 2026
2.1.3	Create a SME training.	Enforcement Manager	Q3 2026
2.1.4	Review compensation structure. (To make sure they're competitive as possible.)	Enforcement Manager, Executive Officer	Q3 2026
2.1.5	Message on social media and work with professional associations as well.	Enforcement Manager and Social Media Coordinator	Q1 2027
2.1.6	Create/update recruitment video.	Enforcement Manager and Social Media Coordinator	Q1 2027

Objective 2.2

Research enforcement options in addition to cite and fine and formal discipline.

Success Measure: More disciplinary options available and costs decreased.

Due Date: Q2 2028

Task #	Task Description	Responsible Party	Due Date
2.2.1	Research/explore public reproval.	Lead Enforcement Analyst	Q1 2026
2.2.2	Research/explore letter of reprimand.	Lead Enforcement Analyst	Q1 2026
2.2.3	Explore a cite and fine for Driving Under the Influence (DUIs).	Enforcement Manager	Q1 2026
2.2.4	Research what other options Healing Boards/District Attorney General Liaison use/suggest.	Enforcement Manager and Executive Officer	Q3 2027
2.2.5	Research alternatives to Failure to Cooperate, e.g., put hold on renewal, create new disposition. (with known incorrect addresses.)	Enforcement Manager and Executive Officer	Q2 2028
2.2.6	Explore adding BreZE codes or dispositions. (e.g., separating abatements, etc.)	Enforcement Manager and Executive Officer	Q2 2028

Goal 3: Outreach and Communication

Objective 3.1

Explore having the ability to capture additional licensee contact information to communicate quickly and effectively.

Success Measure: Increased collection of emails.

Due Date: Q2 2028

Task #	Task Description	Responsible Party	Due Date
3.1.1	Pursue legislation (if no regulatory authority exists). (Already in process, check in with Regulations Attorney to help move it along.)	Regulations Analyst	Q3 2026
3.1.2	Add an optional email field to applications. (research - needs Board vote?)	BreEZe Liaison	Q2 2028
3.1.3	Update BreEZe to capture or require this information.	BreEZe Liaison	Q2 2028

Objective 3.2

Expand outreach presentations to increase stakeholder engagement and involvement.

Success Measure: Increased attendance at meetings and more presentations given.

Due Date: Q3 2027

Task #	Task Description	Responsible Party	Due Date
3.2.1	Update presentation.	Executive Officer	Q3 2025
3.2.2	Give presentation at Occupational Therapy Association of CA (OTAC) conference and other professional conferences.	Enforcement Manager	Q4 2025 and ongoing
3.2.3	Explore topics for town hall meetings (and presentations).	Enforcement Manager	Q2 2026
3.2.4	Give remote presentations (schools, etc.).	Enforcement Manager	Q3 2026 and ongoing
3.2.5	Host CBOT townhalls (virtual, advertise on social media; targeted topics).	Enforcement Manager, Licensing Manager, and Executive Officer	Q4 2026
3.2.6	Explore offering CE credits for attending town halls. (regulations change.)	Executive Officer and Regulations Analyst	Q3 2027

Objective 3.3

Expand the Board's use of social media platforms to create new avenues of communication.

Success Measure: Additional platforms, additional postings per quarter/year.

Due Date: Q4 2027

Task #	Task Description	Responsible Party	Due Date
3.3.1	Begin diverse postings about professional topics, tips for licensure, etc.	Social Media Coordinator	Q3 2026
3.3.2	Explore additional platforms.	Social Media Coordinator	Q3 2026
3.3.3	Work with other DCA programs to see how they use social media (e.g., Facebook).	Social Media Coordinator	Q4 2027
3.3.4	Research administration of Facebook page.	Social Media Coordinator	Q4 2027

Objective 3.4

Conduct outreach to explain the Board's role and clarify the difference between consumer protection and advocacy.

Success Measure: Website updated and information included in presentations.

Due Date: Q3 2026

Task #	Task Description	Responsible Party	Due Date
3.4.1	Include above information during outreach presentations and social media. (see objective 3.3)	Executive Officer	Q2 2025 and ongoing
3.4.2	Add mission of Board to website.	BreEZe Liaison	Q3 2025
3.4.3	Add information about consumer protection to Frequently Asked Questions on website.	BreEZe Liaison	Q3 2025
3.4.4	Collaborate with professional associations to help convey advocacy is not CBOT's role.	Executive Officer	Q3 2026 and ongoing

Goal 4: Laws and Regulations

Objective 4.1

Increase communication about new, or changes to, laws and regulations to keep licensees informed and compliant.

Success Measure: Website updated, process for completed packages written.

Due Date: Q1 2027

Task #	Task Description	Responsible Party	Due Date
4.1.1	Discuss disseminating complete package announcements to licensees. (cost effective, is email ok?)	Executive Officer and Regulations Analyst	Q3 2025
4.1.2	Use continuing education classes.	Licensing Manager	Q3 2026 and ongoing
4.1.3	Review and update list of pending packages on website.	Regulations Analyst	Q1 2027
4.4.4	Collaborate with legal counsel on minimum posting requirements for pending packages.	Regulations Analyst	Q1 2027

Objective 4.2

Review and update regulations as necessary to ensure they are relevant and effective.

Success Measure: Regulations reviewed and process map created.

Due Date: Q1 2027

Task #	Task Description	Responsible Party	Due Date
4.2.1	Collaborate with legal counsel to review all pending packages and define reason for any delays.	Executive Officer and Licensing Manager	Q1 2025 and ongoing
4.2.2	Collaborate with legal counsel to review current regulations, looking for any needed updates.	Executive Officer and Licensing Manager	Q1 2025 and ongoing
4.2.3	Create process maps for Board-specific regulations update processes.	Licensing Manager	Q1 2027

Goal 5: Organization and Administration Effectiveness

Objective 5.1

Develop relationships between management and staff to promote a safe, diverse, and equitable workplace.

Success Measure: Increased trainings, collaborative projects, and Employee Satisfaction and Engagement action plan created.

Due Date: Q3 2026

Task #	Task Description	Responsible Party	Due Date
5.1.1	Have Diversity, Equity, and Inclusion trainings and workgroups. (Work with SOLID Training)	Executive Officer	Q1 2025 and ongoing
5.1.2	Have more collaborative projects with staff (between units and individuals).	Enforcement and Licensing Managers	Q1 2025 and ongoing
5.1.3	Increase staff appreciation/social events.	Enforcement and Licensing Managers, Executive Officer	Q4 2025 and ongoing
5.1.4	Explore doing a management ride along/job shadow to increase understanding of staff workload/environment.	Enforcement and Licensing Managers, Executive Officer	Q2 2026 and ongoing
5.1.5	Participate in Employee Satisfaction and Engagement Assessment and Action Plan (with SOLID Planning).	Executive Officer	Q3 2026

Objective 5.2

Increase staff training to provide the resources necessary for increasing effectiveness and efficiency.

Success Measure: Staff taking more classes, procedures completed.

Due Date: Q4 2030

Task #	Task Description	Responsible Party	Due Date
5.2.1	Have staff develop and present their own trainings.	Licensing and Enforcement Managers	Q2 2025 and ongoing
5.2.2	Use LMS for more than just for required training.	Licensing and Enforcement Managers	Q3 2025 and ongoing
5.2.3	Explore customized trainings from SOLID Training. (e.g., Finding Time - Improving Your Time Management Skills, Exceptional Customer Service.)	Licensing and Enforcement Managers	Q4 2026
5.2.4	Develop refined procedures and make them accessible.	Executive Officer	Q4 2030 and ongoing

Objective 5.3

Review and refine board processes and procedures to improve efficiencies and effectiveness.

Success Measure: G drive cleaned, Adobe licenses distributed, and SharePoint implemented.

Due Date: Q4 2030

Task #	Task Description	Responsible Party	Due Date
5.3.1	Explore cloud storage possibility.	Executive Officer	Q2 2025
5.3.2	Research Adobe licenses.	Enforcement Manager	Q3 2025
5.3.3	Hold staff meetings to gather staff input for improvements.	Executive Officer, Licensing and Enforcement Managers	Q4 2025 and ongoing
5.3.4	Develop a plan for keeping procedures up to date.	Executive Officer, Licensing and Enforcement Managers	Q4 2026
5.3.5	Create an intranet for CBOT/SharePoint site that hosts resources for staff.	Executive Officer	Q4 2030
5.3.6	Clean up/reorganize the G Drive.	Executive Officer, Licensing and Enforcement Managers	Q4 2030

Objective 5.4

Explore and implement the most effective methods for delivering board meeting agendas and materials.

Success Measure: Materials delivered to board members in a timelier manner according to board president input.

Due Date: Q3 2026

Task #	Task Description	Responsible Party	Due Date
5.4.1	Review and share with board president the DCA timeline for providing board materials.	Executive Officer	Q4 2025
5.4.2	Work with the board president earlier to finalize meeting agendas.	Executive Officer	Q3 2026
5.4.3	Explore implementing electronic meeting agenda and packets.	Executive Officer	Q3 2026
5.4.4	Research other board practices.	Executive Officer	Q3 2026

Objective 5.5

Promote awareness of board member vacancies to foster a diverse candidate pool.

Success Measure: Social media posts live, web page updated, dialogue established with appointing authorities.

Due Date: Q3 2025

Task #	Task Description	Responsible Party	Due Date
5.5.1	Announce vacancies on social media.	Social Media Coordinator	Q2 2025
5.5.2	Work with professional associations to see if they can help get the word out (also could include affinity/Ann's groups)	Executive Officer	Q2 2025
5.5.3	Review web page and see if any updates would be helpful regarding filling board member vacancies.	Licensing Manager	Q2 2025
5.5.4	Reach out to board member appointing authorities (stress CBOT is at quorum).	Executive Officer	Q3 2025

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