

California Board of Occupational Therapy 2016-2019



Adopted: September 17, 2015

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California Board of Occupational Therapy Members

Richard Bookwalter, OT Member, *Vice President*

Jeffrey Ferro, Public Member

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Nancy Michel, Public Member

Denise Miller, OT Member, *President*

Beata Morcos, Public Member

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Alexis Podesta, Acting Secretary, Business, Consumer Services and Housing Agency

Awet Kidane, Director, Department of Consumer Affairs

Heather Martin, Executive Officer, California Board of Occupational Therapy

Message from the Board President

On behalf of the California Board of Occupational Therapy (CBOT) I want to thank everyone involved in the strategic planning development process for their vision, focus and commitment to the Board's mission – to protect California consumers of occupational therapy services through effective regulation, licensing and enforcement.

The 2016-2019 Strategic Plan outlines the Board's commitment to uphold our mission, vision and values with all stakeholders and has been a collaborative effort between Board Members, Board staff, and the public. In this document, we have identified key goals that guide our actions and keep us accountable to those we serve.



This strategic plan is the foundation of the Board's intent and focus in the coming years. It builds upon previous strategic plans and recognizes our commitment to uphold our duties within the Department of Consumer Affairs and to the people of the state of California that receive occupational therapy services.

As President of the Board of Occupational Therapy, I invite all interested stakeholders to engage with us in the next three years to achieve the goals identified in this strategic plan. The Board publishes advance notices of all its meetings (including Board, committee and ad hoc) and encourages your participation and contribution.

Denise M. Miller, MBA OT/L

President, Board of Occupational Therapy

About the Board

Occupational Therapists (OTs) and Occupational Therapy Assistants (OTAs) provide important health, rehabilitation and habilitation services to people of all ages, who, because of illness, injury, or developmental or psychological impairment, need specialized interventions to regain, develop, or build the skills necessary for independent functioning.

Established in 1917, the occupational therapy profession is one of the oldest allied health professions in the United States. SB 1046 created the California Board of Occupational Therapy, effective January 1, 2001, and required license effective January 1, 2003. The Board is responsible for the licensure and regulation of OTs and OTAs in California.

California passed a title control/trademark law for occupational therapy in 1977 Business and Professions Code (BPC), Section 2570, Ch. 836), prohibiting individuals from using the professional titles recognized for Occupational Therapist (OT, OTR) and Occupational Therapy Assistants (OTA, COTA) without appropriate training and education. The law was updated in 1993 (BPC, Ch. 361) to further clarify the minimum education and examination requirements for practicing occupational therapists and occupational therapy assistants. The law had no registration process with the state or enforcement structure, nor did it prevent unqualified individuals from practicing occupational therapy as long as they did not refer to themselves as an occupational therapist or occupational therapy assistant.

OTs and OTAs focus on an individual's ability to effectively engage in performance areas that are purposeful and meaningful, such as activities of daily living (ADLs), and instrumental ADLs, including, among other things, work, education, play, leisure, wellness, spirituality, social participation and other productive activities.

Mission

To protect California consumers of occupational therapy services through effective regulation, licensing and enforcement.

Vision

The California Board of Occupational Therapy, as a model consumer protection agency, aspires to be recognized for our valued commitment to all of our stakeholders.

Values

CONSUMER PROTECTION	We make effective and informed decisions in the best interest, and for the safety of Californians.
EFFICIENCY	We diligently identify the best ways to deliver high-quality services with the most efficient use of our resources.
FAIRNESS	We treat people equally and make decisions without favoritism or prejudice.
INTEGRITY	We are committed to honesty, ethical conduct and responsibility.
COMMITMENT	We take responsibility and are accountable to the public.
TRANSPARENCY	We hold ourselves accountable to the people of California. We operate openly so that stakeholders can trust that we are fair and honest.

Strategic Goals

1	APPLICANT QUALIFICATIONS The Board ensures those seeking licensure meet minimum standards of conduct, education, fieldwork and examination.
2	ENFORCEMENT The Board enforces the laws and regulations governing occupational therapy practitioners by effectively investigating complaints, non-compliance and irregularities, and concludes with an appropriate response.
3	OUTREACH AND COMMUNICATION The Board strives to increase communication, education and outreach efforts to consumers, applicants, licensees, and other stakeholders regarding laws, regulations and the practice of occupational therapy.
4	LAWS AND REGULATIONS The Board modifies, implements and enforces statutes and regulations that strengthen and support the Board's mandate and mission.
5	ORGANIZATIONAL EFFECTIVENESS The Board strives to build an excellent organization through proper Board governance, effective leadership, and responsible management by securing necessary funding and ensuring responsive staff processes.

Goal 1: Applicant Qualifications

The Board ensures those seeking licensure meet minimum standards of conduct, education, fieldwork and examination.

1.1	Create and implement “Application Submittal Checklist” guidelines to clarify application requirements and encourage application completeness.
1.2	Pursue regulatory amendment that would require Occupational Therapists seeking advanced practice approval to complete only Board approved courses, in order to streamline the review process for advanced practice applications.
1.3	Create and implement a cross-reference table that clarifies the relationship between Professional Development Units, Continuing Education Units, and Continuing Education hours in order to better assist licensees in determining whether or not their continuing education courses meet state requirements.
1.4	Develop an outreach strategy to educate potential applicants on the Board’s licensure process including pre and post-licensure requirements.

Goal 2: Enforcement

The Board enforces the laws and regulations governing occupational therapy practitioners by effectively investigating complaints, non-compliance and irregularities, and concludes with an appropriate response.

2.1	Pursue an increase in budgetary authority to secure necessary staffing to improve enforcement processing times.
2.2	Promulgate regulations that require applicants and licensees to attest to reading the governing laws and regulations in order to increase familiarity and instill accountability and individual integrity.
2.3	Expand capacity to manage the increase in both the number of enforcement actions and number of license applications to maintain or increase timely response to consumer complaints and increase consumer protection.

Goal 3: Outreach and Communication

The Board strives to increase communication, education and outreach efforts to consumers, applicants, licensees, and other stakeholders regarding laws, regulations and the practice of occupational therapy.

3.1	Communicate the enforcement process and timeline with complainants and respondents by updating the current enforcement process flowcharts to with the disciplinary process timeline and include flowchart in all complaint responses.
3.2	Develop multimedia (videos, webinars and printed materials), and house them on the Board Web site, that would increase student understanding of the application process and general Board information.
3.3	Develop multimedia (videos, webinars and printed materials), and house them on the Board Web site, that would educate and inform licensees and consumers about general Board processes, regulatory requirements and practice issues.
3.4	Implement email address reporting requirement on new applications and license renewals in order to increase access to the licensee population and better communicate Board information.
3.5	Utilize current social media outlets and technology to increase Board communication to stakeholders by 50%.
3.6	Secure budgetary authority to increase necessary staffing and resources to establish a Board Outreach Coordinator position.

Goal 4: Laws and Regulations

The Board modifies, implements and enforces statutes and regulations that strengthen and support the Board's mandate and mission.

4.1	Promulgate regulations requiring applicants and renewal licensees provide an email address so the Board can increase communication.
4.2	Research regulatory issues affecting the full range of Occupational Therapy practice settings to address diverse Occupational Therapy service delivery models.
4.3	Develop an internal and external "Frequently Asked Questions" for staff and for consumers and licensees, respectively, and post to Web site to clarify laws and regulations.
4.4	Explore the feasibility of a statute amendment that alters the definition of Occupational Therapy to clarify the scope of the Board's oversight over the varying Occupational Therapy capacities.

Goal 5: Organizational Effectiveness

The Board strives to build an excellent organization through proper Board governance, effective leadership, and responsible management by securing necessary funding and ensuring responsive staff processes.

5.1	Conduct a workload analysis and compile data to support appropriate Board staffing levels.
5.2	Devise a plan for knowledge transfer and mentorship opportunities to help facilitate growth and development among Board staff.
5.3	Create a succession plan that includes all Board positions to increase business continuity, efficiency, and staff acquisition, retention, and development.



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This strategic plan is based on stakeholder information and discussions facilitated by SOLID for the California Board of Occupational Therapy in June 2015. Subsequent amendments may have been made after Board adoption of this plan.