



# **California Board of Occupational Therapy**

## 2025-2030 Strategic Plan

Adopted: March 6, 2025

**Prepared by:**

SOLID Planning Solutions

Department of Consumer Affairs

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## **Board Members**

Beata Morcos, President, Public Member

Christine Wietlisbach, Vice President, OT Member

Richard Bookwalter, Secretary, Occupational Therapist (OT) Member

Hector Cabrera, Public Member

**Gavin Newsom, Governor**

**Tomiquia Moss, Secretary, Business, Consumer Services and Housing Agency**

**Kimberly Kirchmeyer, Director, Department of Consumer Affairs**

**Austin Porter, Interim Executive Officer, California Board of Occupational Therapy**

## About the Board

The occupational therapy profession was established in 1917 and is one of the oldest allied health professions in the United States.

Senate Bill 1046 (Murray, Chapter 697, Statutes of 2000) created the California Board of Occupational Therapy, effective January 1, 2001. The Board is responsible for the licensure and regulation of Occupational Therapists (OTs) and Occupational Therapy Assistants (OTAs) in California. The Board's mission is to regulate occupational therapy by serving and protecting California's consumers of occupational therapy services through effective regulation, licensure, and enforcement.

California passed a title control/trademark law for occupational therapy in 1977, establishing Business and Professions Code (BPC), Section 2570, prohibiting individuals from using the professional titles recognized for Occupational Therapists (OT, OTR) and Occupational Therapy Assistants (OTA, COTA) without appropriate professional training/education. The law was updated in 1993 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 an unqualified individual from practicing occupational therapy if the individual did not refer to themselves as an occupational therapist or occupational therapy assistant.

Occupational therapy licensees provide important health, habilitation, and rehabilitation 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 performance of everyday activities (known as 'occupations').

Over the years, there have been amendments to the Board's laws and regulations that have enhanced the Board's ability to protect the consumer, such as development of the Board's Disciplinary Guidelines and adding Citation and Fine authority. To further bolster the regulation of the profession, the Board established supervision requirements, advanced practice education and practice requirements, minimum standards for infection control, and continuing education/competency requirements.

Business and Professions Code (BPC) Section 2570.25 mandates that "protection of the public shall be the highest priority for the California Board of Occupational Therapy in exercising its licensing, regulatory, and disciplinary functions."

To accomplish its mission, the Board:

- Ensures only eligible and qualified individuals are issued a license
- Investigates complaints and criminal convictions; and
- Responds to emerging changes and trends in the profession through legislative or regulatory amendments.

The Board's statutes require individuals, with a few exceptions, engaging in the practice of occupational therapy to possess a license.

## Message from the President

On behalf of the California Board of Occupational Therapy (CBOT), I am honored for the opportunity to present the 2025-2030 CBOT Strategic Plan. 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.

With the help of SOLID Planning, board members, board staff, and the public, we reviewed a structured survey where we identified key goals that guide our actions and keep us accountable to those we serve. We outlined the Board's commitment to uphold our mission, vision, and values.

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 five years to achieve the goals identified in this strategic plan.

Beata Draga Morcos

President, Board of Occupational Therapy

# **Board Mission, Vision, and Values**

## **Mission**

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

## **Vision**

The California Board of Occupational Therapy is a model consumer protection agency recognized for valuing all 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.
- Diversity, Equity, and Inclusion (DEI) - We support diversity, equity, and inclusion in the workplace and in the delivery of our services.

## Goal 1: Licensing

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

- 1.1 Review communication processes to identify efficiencies and other improvements.
- 1.2 Improve communication with applicants and licensees regarding the licensure process, requirements, and processing times.
- 1.3 Review licensing fees to balance fiscal responsibilities and reduce barriers to licensure.
- 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.



## **Goal 2: Enforcement**

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

- 2.1 Evaluate and update the subject matter expert (SME) program to improve recruitment, training, retention, and diversity.
- 2.2 Research enforcement options in addition to cite and fine and formal discipline.

## 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 Explore having the ability to capture additional licensee contact information to communicate quickly and effectively.
- 3.2 Expand outreach presentations to increase stakeholder engagement and involvement.
- 3.3 Expand the Board's use of social media platforms to create new avenues of communication.
- 3.4 Conduct outreach to explain the Board's role and clarify the difference between consumer protection and advocacy.

## Goal 4: Laws and Regulations

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

- 4.1 Increase communication about new, or changes to, laws and regulations to keep licensees informed and compliant.
- 4.2 Review and update regulations as necessary to ensure they are relevant and effective.

## Goal 5: Organization and Administration Effectiveness

**The Board strives to build an excellent organization by ensuring responsible fiscal stewardship and through proper governance, effective leadership, and outstanding customer service.**

- 5.1 Develop relationships between management and staff to promote a safe, diverse, and equitable workplace.
- 5.2 Increase staff training to provide the resources necessary for increasing effectiveness and efficiency.
- 5.3 Review and refine board processes and procedures to improve efficiencies and effectiveness.
- 5.4 Explore and implement the most effective methods for delivering board meeting agendas and materials.
- 5.5 Promote awareness of board member vacancies to foster a diverse candidate pool.

## Strategic Planning Process

To understand the environment in which the Board operates as well as identify factors that could impact the Board's success in carrying out its regulatory duties, the Department of Consumer Affairs' SOLID Planning Unit (SOLID) conducted an environmental scan of the Board's internal and external environments by collecting information through the following methods:

- SOLID interviewed leadership and conducted an online survey for staff during the months of November and December 2024.
- SOLID interviewed or conducted a survey for board members during the months of November and December 2024.
- SOLID conducted an online survey for external stakeholders during the months of November and December 2024.

The most significant themes and trends identified from the environmental scan were discussed by board members, board leadership, and staff during a strategic planning session facilitated by SOLID on January 24, 2025. This information guided the Board in the development of its strategic objectives outlined in this 2025-2030 strategic plan.

## **California Board of Occupational Therapy**

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Strategic plan adopted on March 6, 2025.

This strategic plan is based on stakeholder information and discussions facilitated by SOLID for the California Board of Occupational Therapy on January 24, 2025. Subsequent amendments may have been made after the adoption of this plan.



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