

**OOTA Annual
Business
Meeting**

OOTA 2025
STRENGTH IN UNITY
Transforming Challenges into Opportunities





RIVETUS
Rehabilitation

Town Hall Sponsor

AGENDA

- Call to order
- Quorum
- Approval of 2024 annual business meeting minutes (VOTE)



OHIO OCCUPATIONAL THERAPY ASSOCIATION

OOTA 2025
STRENGTH IN UNITY
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WELCOME TO CONFERENCE 2025

- Our theme – there IS strength in Unity.
- There are over 200 attendees this year!
- Over 100 presentations were submitted for consideration - WOW!
- We have a stunning number of presentations, posters and learning
- We are recording sessions – to build our educational resources
- We have an incredible force working on the conference...but we need more help!
- Please volunteer to work with us on 2026!



Thank you to our Sponsors



2024 Annual Business meeting minutes

**Katelyn Merzke,
COTA/L**

OOTA Secretary

**MOTION TO ACCEPT THE
MINUTES**



OHIO OCCUPATIONAL THERAPY ASSOCIATION



2025 YTD Financial Report

Rebekah Bourgeois,
OTD, MOT, OTR/L

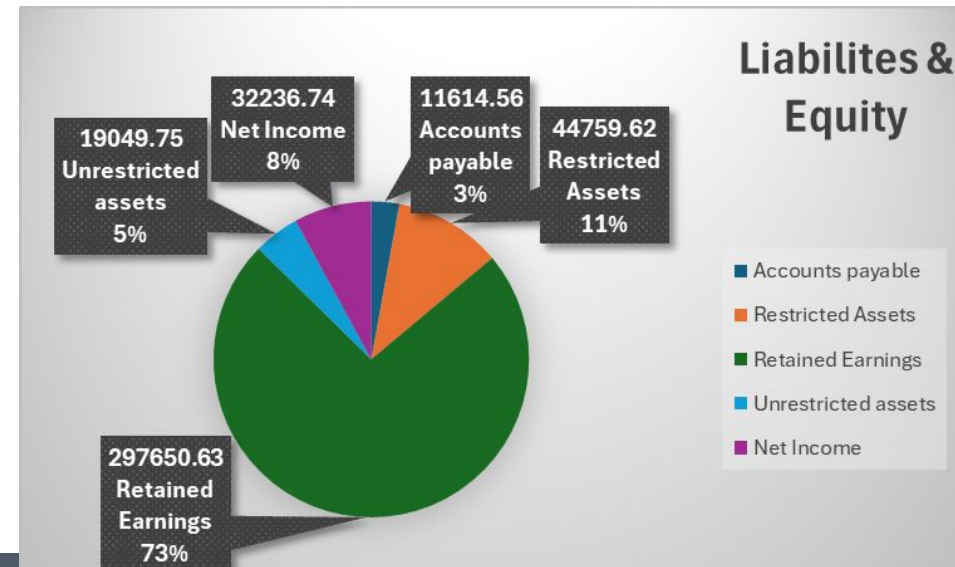
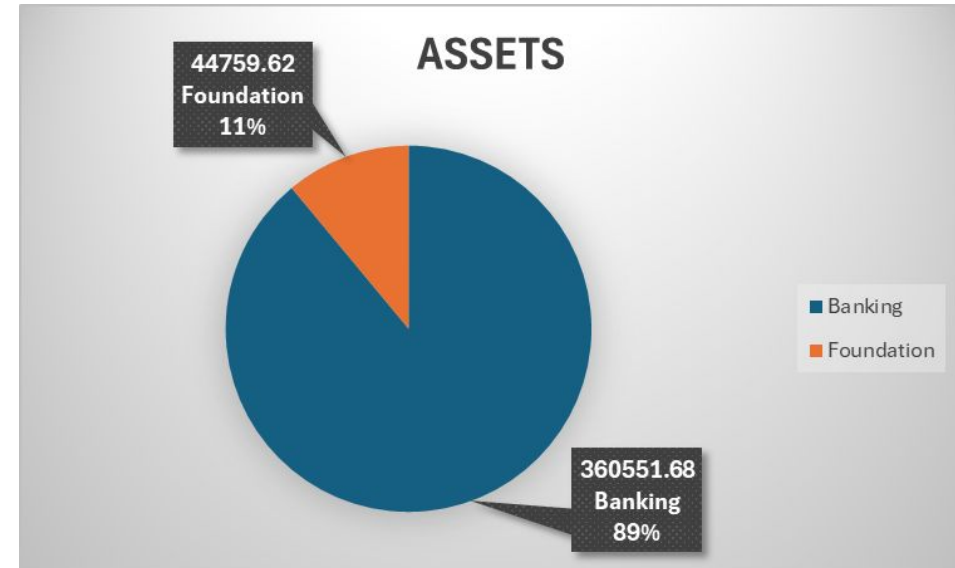
OOTA Treasurer



OHIO OCCUPATIONAL THERAPY ASSOCIATION

Financial Wellness

ASSETS	
Checking	\$103,520.93
Investments	\$257,030.75
AOTF	\$44,759.62
TOTAL ASSETS	\$405,311.30
LIABILITIES	
Accounts Payable	\$8,814.56
EQUITY	
Restricted Net Assets	\$44,759.62
Unrestricted Net Assets	\$19,049.75
Retained Earnings	\$297,650.63
Net Income	\$35,036.74
TOTAL LIABILITIES + EQUITY	\$405,311.30



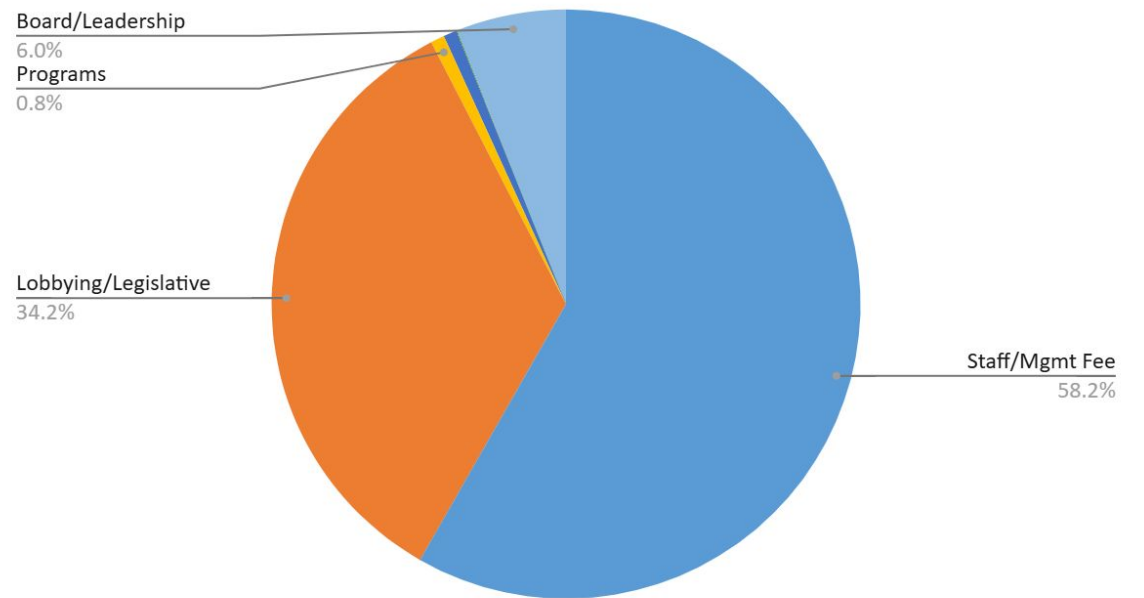
Net Income



EXPENSE 2025

EXPENSE	YTD 2025	YTD 2024
Staff	\$25,075	\$7,438.00
Lobbyist	\$15,750	\$18,000
Conference	\$0	\$587
Banking	\$383	\$1,365
Office/Operations	\$0	\$229
Website	\$23	\$14,902
State/Leadership	\$3,159	\$1,870
TOTAL	\$43,286	\$37,381

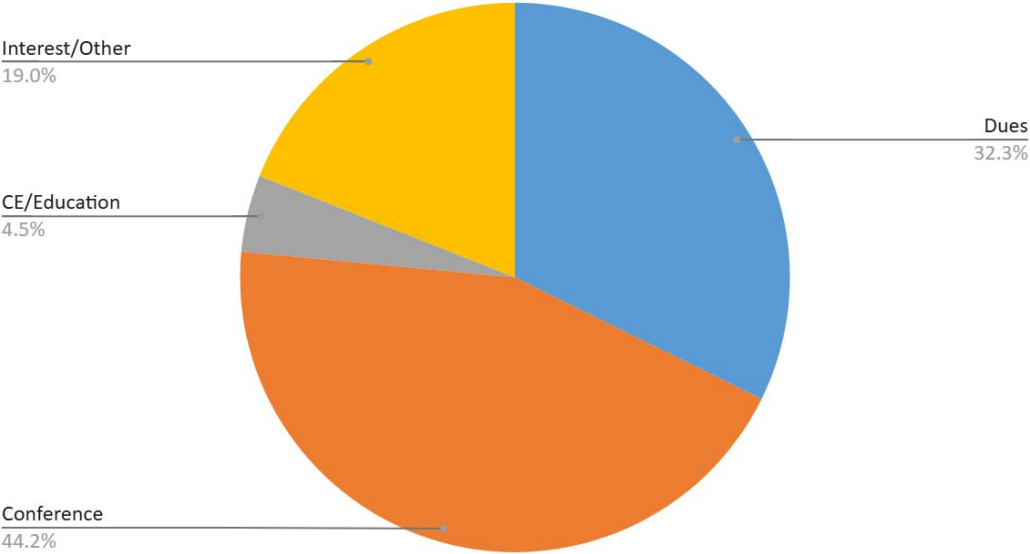
Expense Distribution - YTD 09 30 2025



INCOME 2025

IN C O M E/ R E V E N U E	YTD 2025	YTD 2024
M e m b e r s h i p D u e s	\$28,322	\$43,035
C	\$38,765	\$33,009

Revenue Distribution - YTD 09/30/2025





OOTA ADVOCACY

Year in Review: Advocacy ~ Tracked Legislation

General Update

- In general, HB 96 provides stable funding for Ohio Medicaid and other important public health programming. Unfortunately, the legislature rejected many of DeWine's proposed child health initiatives initially included in his budget proposal in February.
- The top issue in the Ohio General Assembly remains property tax reform and, while there is bipartisan agreement on the need to provide relief to taxpayers, lawmakers remain largely divided on partisan lines over solutions. Several bills have been introduced this year, with some seeing movement as recently as this week. Additionally, the Governor's Property Tax Working Group released their report earlier this month following DeWine's veto of several property tax items in HB 96 in June. Part of the impetus for advancing legislation is a potential 2026 citizen-initiated state constitutional amendment to repeal all property taxes in Ohio.
- OOTA Scope of Practice Update and Behavioral Health Status: We are finalizing a draft bill that would update the scope of practice for OT providers in Ohio to align with AOTA's recently adopted model practice act. In general, this would not expand or grant new powers to OT providers, it simply updates terminology and clarifies certain functions so there is consistency between state law and AOTA recommended language. Additionally, this bill affords us the chance to incorporate language into the Revised Code that would clarify the role of occupational therapy in behavioral health.

Year in Review: Advocacy

Notable Tracked Legislation: We continue to monitor several bills that OOTA may want to support during the legislative process. We feel these bills will have a positive impact on the practice of OT in Ohio or will benefit individuals who may be receiving occupational therapy services.

- House Bill 57 (Jarrells, Williams) – Overdose Reversal Drugs in Schools
- House Bill 59 (Fowler Arthur, Hiner) – Licensure Reform Omnibus
- House Bill 91 (Odioso, Deeter) – Create TBI Treatment Accelerator
- House Bill 141 (Baker, Abrams) – License Prescribed Pediatric Extended Care centers
- House Bill 144 (Click) – Communications Disability Database Expansion
- Senate Bil 69 (Romanchuk) – Public Pension System Omnibus

Health Insurance Legislation: There are several bills pending that would make positive reforms to health insurance laws in Ohio. In general, these bills enjoy support from provider and patient advocacy groups and opposition from business groups (Ohio Chamber, NFIB) and the Ohio Association of Health Plans. We will look for opportunities to advocate for these measures where appropriate—

- House Bill 214 (K. Miller) – PA Gold Carding, Data Reporting
- House Bill 219 (Deeter) – Network Adequacy Standards
- House Bill 220 (Workman) – Medicaid Prior Authorization Requirements
- House Bill 390 (Schmidt) – Prohibit Copay Recoupment by Provider
- House Bill 453 (Lorenz) – Insurance Coverage of Applied Behavior Analysis
- Senate Bill 160 (Liston, Johnson) – Non-Medical Switching
- Senate Bill 162 (Blessing) – Health Plan Claw Back Limitation

President's Report



OHIO OCCUPATIONAL THERAPY ASSOCIATION

Christie Tuttle, MS., COTA/L, ROH
OOTA President

OOTA 2025
STRENGTH IN UNITY
Transforming Challenges into Opportunities



Membership



Membership

2025 membership currently:

641 OT (22 retired; 31 professional; 10 life long learners)

114 OTA (4 life long learner)

307 Students

New Practitioner level: 21

Student membership options/benefits to encourage involvement

Thank you to our NEW LIFE LONG LEARNERS

Life long learner benefits include deepened educational opportunities include conference registration! This year's Life Long Learners include:

OT Members

Matthew	Husband
Christine	Thomas
Alyssa	Clark
Sameera	Basith
Sarah	Rospert
Karla	Reese
Bonnie	Boenig
Adam	Snyder
Jewel Elias	Crasta

OTA Members

Melissa	Sturgill
Susan	Walliser-Willis
Corrina	Walton
Stella	Mohler

Membership

Licensed practitioners in Ohio:

7,717 Occupational Therapists (14 more than in 2024)

4,814 Occupational Therapy Assistants (214 more than in 2024)

Nearly 12% of OTAs nationally are licensed in Ohio

~8.3% of OT licensees are members

~2.5% of OTA licensees are members

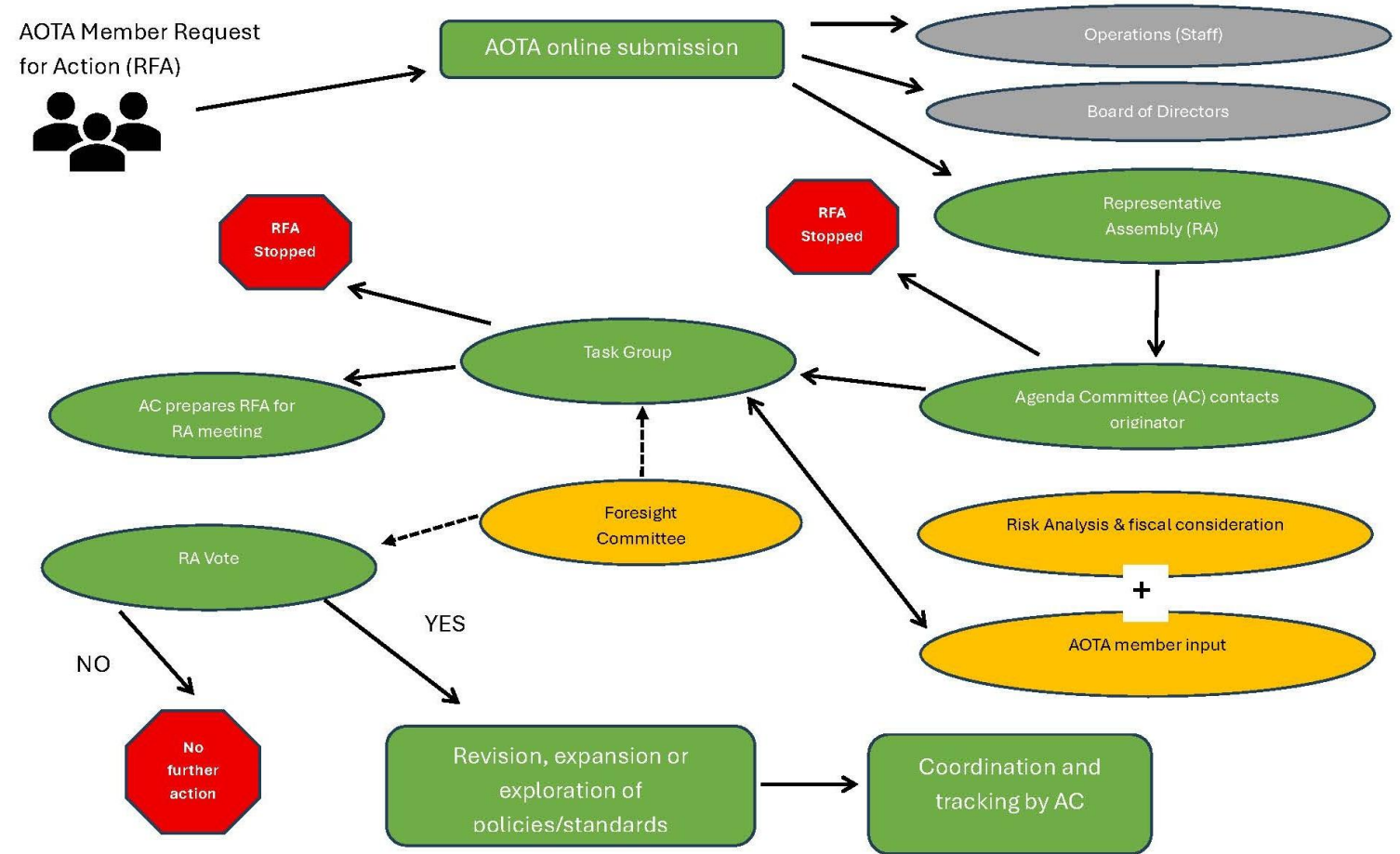


Board Member Changes

- **Vice President**-Teri LaGuardia, OTD, MOT, OTR/L
 - **Treasurer**-Rebekah Bourgeois, OTD, MOT, OTR/L
 - **Conference Chair**-Ann Bartman, Ed.D, OTD, OTR/L, CPAM
 - **Student Committee**-Katarina Garibian, OTD, OTR/L
 - **Social Media & Public Information**-Nathan Grizenko, OTD, OTR/L
 - **Education SIS**-Dr. Kelle DeBoth Foust, PhD, OTR/L
 - **Membership Chair**-Kara Brogan OTR/L
 - **Central District**-Co-Chair-Bailey Peters, OTD, OTR/L
- 

RA Rep for Ohio

- Matthew Husband
MS, OTR/L
- Term began on July 1,
2024
- Contact Info:
 - OHRep@aota.org.



RA Rep for Ohio



Representative Assembly 2025 Meeting Summary

The Representative Assembly (RA) motion process spans the entire year, as Requests for Action (RFAs) can be submitted at any time. With one meeting scheduled, the 2025 cycle concluded with voting at the spring meeting in April. The timeline below outlines key steps from the initial call for motions through the final decisions made at the RA Meeting:

Timeline for Representative Assembly Initiatives and Events

- June 2023: COE Survey for Philosophy of Occupational Therapy
- September – October 2024: Ethics Survey for Code of Ethics Revisions
- August - September 2024: CCC Survey
- January 31, 2025: Deadline for submission of all Requests for Action and Motions (Reviewed by Agenda Committee)
- February 10–21, 2025: CommunOT Member Feedback Period
- February 24–28, 2025: Asynchronous CommunOT Task Group Discussions (Open for member observation)
- March 5, 2025: Synchronous Virtual Task Group Session to Create Motions
- April 24, 2025: Annual Spring Meeting

In each step of the process, the RA Leadership teamed with multiple areas of AOTA to utilize social media, the AOTA website, email blasts, CommunOT, and/or OT Essentials for communication.

The Representative Assembly convened on April 24, 2025, to vote on key issues impacting our organization and profession. During the meeting, nine motions were presented; the outcomes of each motion are summarized below:

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Motions

Motion 01-04242025: Charging the Speaker of the Representative Assembly with conveying the findings of the “Fall 2023 RA Workgroup on School-Based Practice” to the Board of Directors of the AOTA at the next Board of Directors meeting was adopted.

A significant number of occupational therapy practitioners identify school-based practice as their primary practice setting. Following two Requests for Action (RFA) and one Motion at the Fall 2023 meeting of the Representative Assembly, a workgroup was formed to generate recommendations to better support the needs of occupational therapy practitioners in school-based practice settings. Many of the recommendations do not fall within the purview of the Representative Assembly to address but do fall within the purview of the Board of Directors. Tasking the Speaker with conveying the aforementioned relevant documents and recommendations is likely to benefit all school-based practitioners should the Board choose to adopt any of the recommendations or refer them to other AOTA bodies.

Motion 02-04242025: Commission on Practice revised Guidelines for Occupational Therapy Services in Early Intervention and Schools official document was adopted.

This motion directs the Commission on Practice to create an official AOTA document to address the following identified issues: parity discrepancies between school-based occupational therapy practitioners and state education

agency certified practitioners, consistency and competency in providing school occupational therapy services, and opportunities and challenges related to advancing careers of school-based occupational therapy practitioners, as well as targeting workload versus caseload issues within school-based practice. Though early intervention and school-based practice are guided by common legislation, the practice standards, settings, and practice-related challenges are distinctly different. It is critical that each practice setting has targeted, and clearly articulated standards of practice supported by the official documents.

Motion 03-04242025: The Philosophical Base of Occupational Therapy document was adopted.

This motion approved the Philosophical Base of Occupational Therapy Document with the following editorial changes requested.

- Add a statement indicating the purpose and intended audience for this document.
- Change wording – Determinants to Drivers, and change agents to change maker (or innovator)
- Move the occupational science paragraph up one paragraph to improve the flow and allow the document to end on occupational therapy.
- Take out the definition of Occupational Justice and reference the OTPF for all the examples of occupational goals.
- Add a reference to the Ethics document along with the OTPF.

Motion 04-04242025: The revisions to the AOTA Model Continuing Competence Requirements were adopted.

This motion allows the AOTA Model Continuing Competence Requirements to move forward as proposed. This includes member feedback, updated language, and the additional competence related to formal mentorships of occupational therapy capstone students or occupational therapy assistant baccalaureate project students.

Motion 05-04242025: The revisions to the CCC Standard Operating Procedures were adopted.

The revisions to the CCC Standard Operating Procedures follow the five-year updates that are made to AOTA documents. These were passed with this motion having the affirmative.

Motion 06-04242025: Adopting a policy that supports the ethical development and integration of artificial intelligence (AI) into occupational therapy practice, education, and research as proposed was adopted.

This policy aims to promote the ethical, safe, and effective use of artificial intelligence (AI) in occupational therapy (OT) practice, education, and research, ensuring compliance with the profession's ethical standards and fostering innovation while maintaining a client-centered approach, privacy, and sustainability. Occupational therapy practitioners, students, educators, and researchers have a vital role in training AI tools so that the created output is consistent with and inclusive of occupational therapy models and practice frameworks. The policy aligns with the Occupational Therapy Practice Framework (OTPF), which supports the use of applicable products and technologies to enhance occupational performance across various contexts, including virtual environments.

Motion 07-04242025: The revisions to the Agenda Committee Standard Operating Procedures were adopted.

The revision included the addition of the attachment for the process of submitting requests for action.

Motion 08-04242025: The revisions to the Ethics Committee Standard Operating Procedures were adopted.

The changes to the document are minimal and support the inclusion of occupational therapy assistants.

Motion 09-04242025: The revisions to the Code of Ethics were adopted.

The task group had a robust discussion regarding the change of the term “equality” to “equity,” and several members expressed their concern with the change. However, a majority of the group identified that the change aligns with current trends in terminology. The group identified that there is a need for stylistic changes to the document so that it reads as though it was written cohesively.



Winners

We Have Our Winners!
OHIO RECIPIENTS

- HEALTH ADVOCATE
Rebecca Finni, DHS, OTR/L, RAC-CT, FAOTA
- TERRY BRITTELL OTA/OT PARTNERSHIP AWARD
Natalie Chang Wright, MBA-HCM, COTA/L, ROH and
Shanese Higgins, DHSc, OTR/L, BCMH, FAOTA
- ROSTER OF FELLOWS
Rhonda Dqvis-Cheshire, OTD, MOT, OTR/L
Shelley D. Coleman Castro, MS, OTR/L, BCP, CPST

Thank You for Being Part of Our
Community!

The graphic is a celebratory announcement for AOTA winners in Ohio. It features a dark blue background with yellow and orange streamers and confetti. The AOTA logo is in the top left. A large yellow banner with the word "Winners" in white script is at the top. Below it, the text "We Have Our Winners! OHIO RECIPIENTS" is displayed. Three award categories are listed, each preceded by a gold star icon: "HEALTH ADVOCATE" (Rebecca Finni), "TERRY BRITTELL OTA/OT PARTNERSHIP AWARD" (Natalie Chang Wright and Shanese Higgins), and "ROSTER OF FELLOWS" (Rhonda Dqvis-Cheshire and Shelley D. Coleman Castro). The graphic concludes with the text "Thank You for Being Part of Our Community!" flanked by two small white stars.

AOTF Scholarships



OHIO AOTF Scholarship Application Winners 2024-2025

OTD STUDENT SCHOLARSHIP	OTD STUDENT SCHOLARSHIP	OTA STUDENT SCHOLARSHIP
Danielle Francis, Kettering College of Medical Arts	Cora Pack - Xavier University	Laura Knight - Lorain County Community College
\$770.00	\$770.00	\$770.00



AOTF Applications

UPDATED
Applications open in January 2026

Continuing Peds Advocacy Projects

- Promote rule revisions to protect OTAs in school-based practice
- Provide support for Every Child Succeeds Act
- Promote mental health in schools
- Support efforts to ensure support of disabilities; medicaid and department of education programs
- Working to support schools as medicaid cuts and property tax cuts are on the horizon
- CPT Codes for caregivers



The image features a large white circle centered on a solid purple background. Inside the white circle, the words "OOTTA AWARDS" are written in a bold, orange, sans-serif font. To the left of the white circle, there is a series of seven short, orange, diagonal dashes that curve around the edge of the circle. In the bottom right corner, where the white circle meets the purple background, there is a small, solid green circle.

OOTTA AWARDS

OOTA Celebrates Members & Achievements

Award of Merit - *Jennifer Thompson*

Continuing Education Award - *Karla Reese & Jenn Soros (OT After Dark); Colton Sayers; Barbara Elleman; Marita Hensley; Danielle Nelson*

Virginia Scardina Lectureship Award - *Jessalyn Dickerson*

Pioneer Award - *Melanie Stevens; Missy Anthony*

Jane Case-Smith Outstanding OT Student Award - *Claire Horan; Kristal Hamilton*

Sharon K. Ashworth Outstanding OTA Student Award - *Jessica Honican*

Certification of Appreciation - *Lindsay Davis; Global Professional Services*

Honorary Membership - *Danny Hurley*

Legislator Award - *Maureen Corcoran*

Model Practice Award - *Natalie Centers; Colton Sayers*

Service Award - *Katrina McWilliams; Mary Arnold; Jennifer Thompson; Rebecca Young*

Outstanding Fieldwork Site - *Drake Hospital (Colton Sayer); Southwestern City Schools (Kristen Bach); Galvin Therapy Center (Erica Furniss/Kara Brogan)*

Excellence in Fieldwork Education - *Christina Andreyko; Amy Grooms; Karen Porter*

Passion Award- *Dr. Karla Reese DHSC, OTR/L*





2025 Year in Review

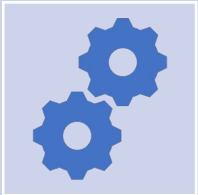
Year in Review: Strategic Planning



Be the preferred provider of continuing education for OT/OTA students and practitioners in Ohio & provide opportunities for CE courses online AND in-person

30+ Live CE Events in since our last Annual Conference

31 On Demand Webinars currently on the OOTA Learning Platform with more being added all the time



More opportunities for members to get involved at their level of comfort recognizing that community is more important than ever before – together not only can we do more, but we can expand recognition and capacity!

Strategic planning with GPS

Added THREE new committees:

–Newsletter

–Microcredentials

–Mentorship



Capitalize on additional educational programs designed to support students and professionals with information, support and continuing education credits!

Feeding Symposium – January 10, 2026

Student Conclave – January 14-15, 2026

Winterfest – February 2026

00TA Website



OHIO OCCUPATIONAL THERAPY ASSOCIATION

[home](#) [about](#) [education](#) [newsletter](#) [events](#) [2025 annual conference](#) [careers](#) [join oota](#) [members-only](#) [DEIJAB](#)

For Our Members & Their Clients

The Ohio Occupational Therapy Association is a voluntary professional organization of occupational therapy practitioners who are dedicated to supporting the profession through advocacy and communication.

[learn more →](#)



OOTA Involvement in pediatrics

Ohio School Health
Services
Association
(OHSHA)

Monthly board meetings – OOTA now serves as VP!



The Ohio Coalition
for the Education of
Children with
Disabilities
(OCECD)

Monthly board meetings



Office of
Exceptional
Children (OEC)

Bi-monthly meetings

Hill Day May 7, 2025



NEW COMMITTEES – NEW OPPORTUNITIES



MENTORSHIP

- Committed to orienting participants;
- Applications for both mentee and mentor have been completed and are being reviewed
- We have a rubric for matching
- Ultimately, we want this program to advance quality, support advanced learning and practice, and build our community networks.

MICROCREDENTIALING

- Creating microcredentialing options with electives and basic courses
- Designed to support students and early-career professionals
- Expected to become available in March
- Future considerations include “advanced practice” microcredentials
- We are also looking at “transition” microcredentials for people transitioning between career settings

NEWSLETTER

- Edited, written, and directed by members of OOTA
- Designed to provide members not only valuable information, but a chance to get to know members and their influence and impact in healthcare
- Explore your creative side: writing, designing, participating in the newsletter committee work
- Currently quarterly, with YOUR contributions, we can move to bi-monthly

OOTA SOCIAL MEDIA

OOTASocialMedia@gmail.com

INSTAGRAM



@ohio_ot_association

FACEBOOK



@ootainc

LINKEDIN



@ohiootassociation



OOTA SOCIAL MEDIA

OOTASocialMedia@gmail.com

<https://bit.ly/43kgUjc>

August 6, 2025 / Uncategorized

OOTA Social Media Requests

OOTA Social Media Requests

This form is for OOTA leaders and volunteers to submit information about events, announcements, committee opportunities that they wish to be communicated via OOTA social media.

Name (Required)

First

Last

Email (Required)

Enter Email

Confirm Email

For what OOTA group/committee/district are you submitting this request? **(Required)**

OOTA EDUCATIONAL EVENTS – 2026 (so far!)



OOTA STUDENT COMMITTEE



2026 Student Conclave



Wednesday, January 14
Thursday, January 15
6:00 pm - 8:00 pm

Year in Review: AOTA Collaborative Update

- AOTA-ASAP Collaborative, sharing and AMC along with Nevada, Tennessee, and Missouri
- Global Professional Services (AMC) - This is our staff
- We are 18 months in, we are seeing some exciting changes – increase in committees and volunteerism – district chairs are supportive; SIS chairs are supported; new committee chair
 - Staff supported a facilitated strategic planning session – we have additional task forces and opportunities FOR YOU!
- Financially we are stronger – our expenses have *gone down* even though we are now paying for staff; our income has gone up [new member levels; new opportunities!]
- Incredibly beneficial to the day to day needs of the association – website; educational events; conference; committees and more!
- More opportunities for members – WE CAN BRING YOUR IDEAS TO LIFE!

Strategic Task Forces: The Work of OOTA

Leadership – Develop transformational leaders to advance Ohio's OT profession.

Education & Research - Advance excellence in occupational therapy through innovative education and research.

Communication - Build a connected, informed, and strong community through strategic communication directed by OOTA.

Collaboration - Cultivate strategic collaborations to amplify advocacy, workforce development, and innovation.

Membership - Cultivate a thriving, engaged membership community through building a dynamic, inclusive membership.

Advocacy - Establish OOTA as a national leader in occupational therapy advocacy by increasing influence, improving reimbursement, amplifying OTP's value, and growing engaged membership.

Advocacy Task Force

ACTIVITIES INCLUDE

- Hill Day 2026
- Develop rapid response legislative alert system
- Partner with healthcare professionals to co-advocate
- Host panels with legislators
- Develop a member reimbursement FAQ/resource hub
- Identify champions to support our efforts
- Create newsletters to showcase OT
- Create template letters
- Build media recognition
- Host job fair
- Develop quarterly virtual update
- Create toolkits and “how-to” guides
- Track and report on workforce trends
- Survey members regularly



Membership Task Force

ACTIVITIES INCLUDE

- Host regular social/networking events
- Publicize success stories and case studies
- Create “Why OOTA” membership kits
- Develop easy-to-find involvement guidelines
- Offer student-to-professional membership packages
- Host capstone project hubs and support
- Develop employer incentive packages
- Highlight benefits that reduce burnout
- Gather salary/debt data to inform advocacy efforts
- Conduct needs assessment



Leadership Task Force



ACTIVITIES INCLUDE

- Leadership training
- Microcredentialing
- Ambassador programs
- Succession planning
- Comprehensive onboarding for all leadership roles
- Decision-making protocols ensuring all voices are heard
- Growth mindset workshops
- Safe space check-ins
- Create peer mentoring across districts
- Create digital repositories
- Transition checklists
- Consider, create and develop professional develop stipends
- Design tier reward systems
- Leadership awards

Education & Research Task Force



ACTIVITIES INCLUDE

- Streamline CEU processes
- Develop OTA specific events and workshops
- Implement attendee-driven programming
- Create searchable EBP databases for OOTA members
- Establish a literature review section with member-submitted critiques
- Identify EBP champions to field practice questions
- Pursue grant funding for member research projects
- Develop clinical/academic fellowship programs
- Support conference/journal opportunities
- Implement mid-year virtual learning events
- Promote digital learning platforms and mobile-friendly content
- Create clinical tracks for practice area transitions
- Provide research mentorship



Communication Task Force



ACTIVITIES INCLUDE

- Website improvements
- Social media presence
- Establish virtual support rooms by practice settings
- Increase staff visibility
- Implement member feedback channels
- Showcase volunteer opportunities
- OT/OTA programs
- Public education campaigns
- Produce an annual report
- Modernize CEU offerings
- Implement district-focused communications
- Develop a newsletter

Collaboration Task Force

ACTIVITIES INCLUDE

- Establish possible formal relationships with partners to promote Ohio specific data and co-host approved events
- Collaborate with healthcare practitioners and their representative associations on joining policy
- Launch an employer toolkit
- Create a career center platform
- Offer “Employer Champion” awards
- Survey employers regarding specialty needs
- Explore joint research projects on OT outcomes
- Co-develop paid internship programs
- Host annual educator-employer summit
- Offer sponsorship and advertising for partners and employers
- Develop DEIJAB focused CEUs
- Partner with community organizations



All of Work includes a Patina of DEIJAB

- All strategic task forces include a representative from DEIJAB
- We are hosting book clubs focused on DEIJAB considerations
- Join us by downloading the FABLE app and participating in our book club!



Year in Review: Association Management Updates



New additions to the website – Forums, DEIJAB.
You need to play on this to help make it useful



New learning platform – we are now categorizing
for easier access



Transitioned to new contact email:
ootastaff@gpsforgrowth.com



Now we use google meet for events – there is live
translation if you need it



Insurance-we will be covered under GPS



Phone line/texts

CE Certificates for Conference 2025



- Virtual posters will be available for 2 weeks after conference
- Poster session CEs will be available upon completion of an evaluation that will be issued to all attendees that were signed into sessions yesterday
- CE certificates should be emailed 3 weeks after conference.

A close-up photograph of a dandelion seed head in the foreground, with many seeds blowing away into the air. The background is a soft, out-of-focus field of green grass and other dandelions, bathed in a warm, golden light that suggests a sunset or sunrise. The overall mood is peaceful and hopeful.

Thank you!

Christie Tuttle MS., COTA/L. ROH
Email: christie.tuttle.ot@gmail.com