OOTA Annual Town Hall

October 17, 2026

OOTA



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1971 → 2026
PIVOT POINTS
AMPLIFY. ADAPT. ADVANCE.

Thank you to the Hilton Easton Staff



WELCOME TO CONFERENCE 2026

- Our theme – there IS strength in Amplify, Adapt, Advance.
- There are over 180 attendees this year!
- Over 90 presentations were submitted for consideration - WOW!
- We have a stunning number of presentations, posters and learning
- We have an incredible force working on the conference…but we need more help!
- Please volunteer to work with us on 2027!!

Agenda

- Call to order
- Quorum
- Approval of 2025 annual business meeting minutes (VOTE)

2025 Annual Business meeting minutes

Katelyn Merzke, COTA/L

OOTA Secretary

MOTION TO ACCEPT THE MINUTES

OOTA Biz Meeting 2025

2026 YTD Financial Report

Rebekah Bourgeois, OTD, MOT, OTR/L

OOTA Treasurer

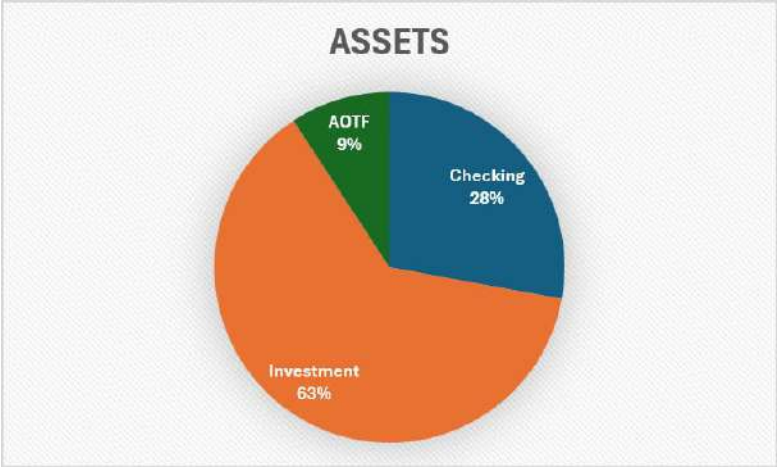
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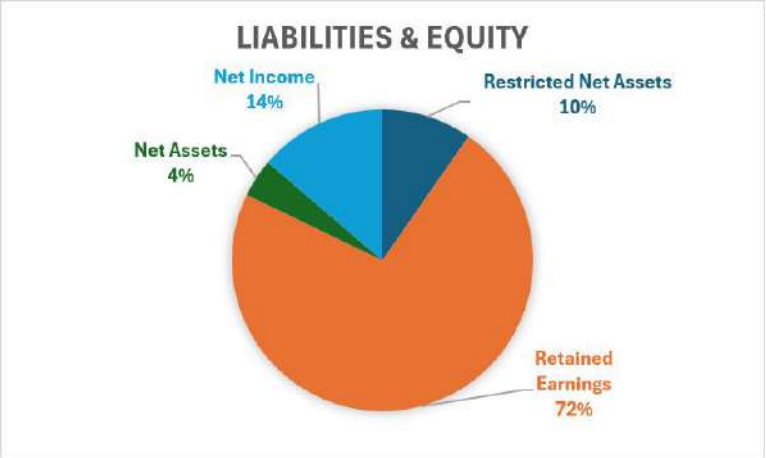


OOTA FINANCIAL WELLNESS - THE BALANCE SHEET

ASSETS	9/30/2026	
Checking	$135,130.39	
Investment		$304,831.06
AOTF	$44,759.62	
TOTAL ASSETS		**$484,721.07**
LIABILITIES		
Accounts Payable	$22,022.31	
EQUITY		
Restricted Net Assets		$44,759.62
Retained Earnings	$335,368.52	
Net Assets		$18,949.75
Net Income		$63,620.87
TOTAL LIABILITIES+EQUITY		**$484,721.07**

Last year our Assets/Liabilities+Equity = $405,311.30
This year increases our financial wellness by 16%



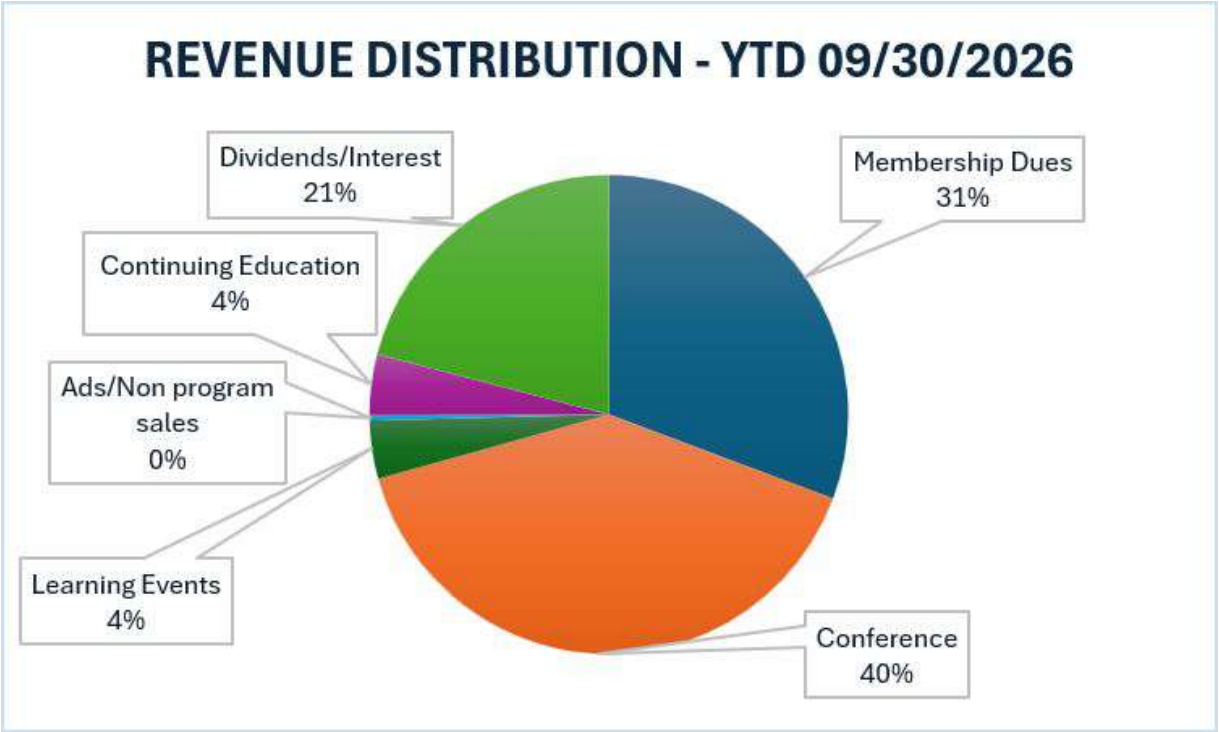


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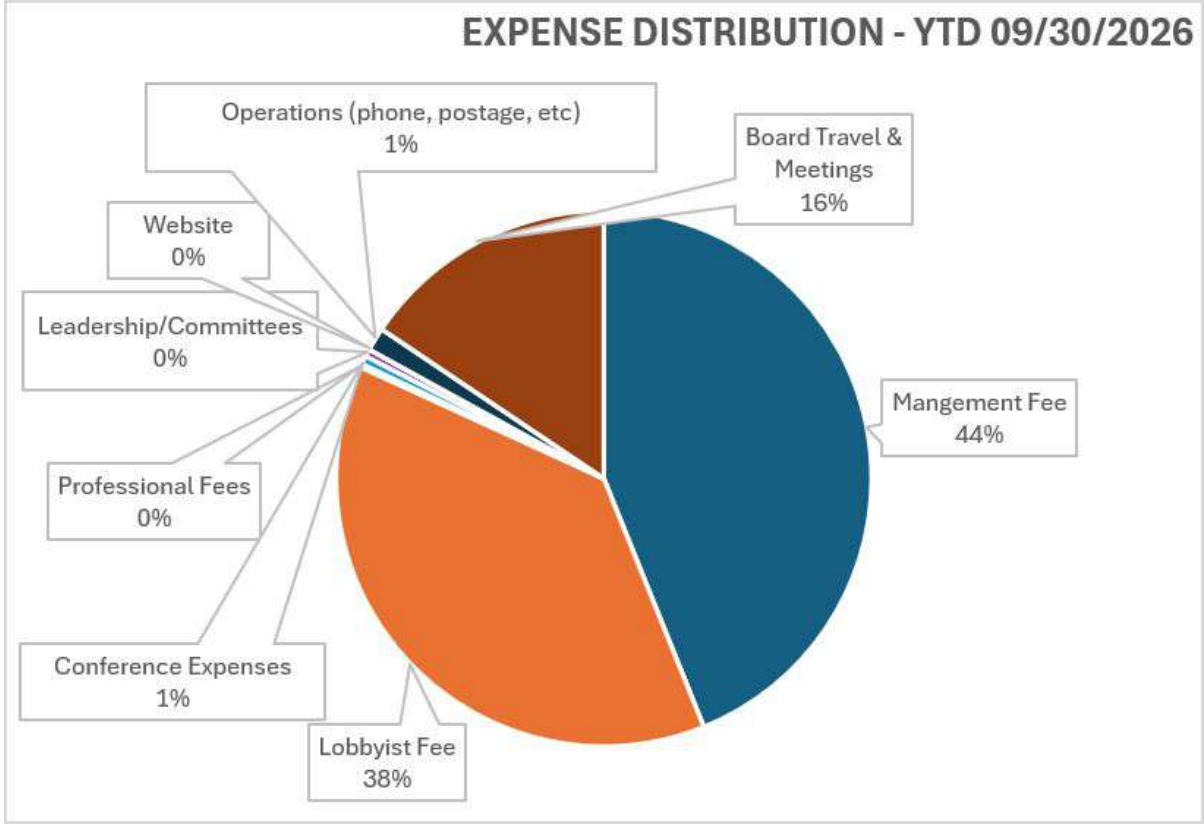
OOTA FINANCIAL WELLNESS - INCOME

INCOME	YTD 2026	YTD 2025
Membership Dues	$35,210.52	$28,321.51
Conference	$45,816.61	$38,764.81
Learning Events	$4,500.00	$0.00
Ads/Non program sales	$400.00	$778.00
Continuing Education	$4,713.08	$3,972.82
Dividends/Interest	$23,998.47	$15,859.92
TOTAL EARNED INCOME	**$114,638.68**	**$87,697.06**



OOTA FINANCIAL WELLNESS - EXPENSES

EXPENSE	YTD 2026	YTD 2025
Management Fee	$22,400.00	$30,675.00
Lobbyist Fee	$19,350.00	$18,000.00
Professional Fees	$99.90	$0.00
Conference Expenses	$267.58	$0.00
Leadership/Committees	$225.75	$400.00
Website	$0.00	$23.28
Operations (phone, postage, etc)	$721.86	$403.07
Board Travel & Meetings	$7,952.72	$3,158.97
TOTAL EXPENSES	**$51,017.81**	**$52,660.32**
NET INCOME	**$63,620.87**	**$35,036.74**



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OOTA Advocacy

Danny Hurley

Year in Review:

Advocacy

OOTA Advocacy Day 2026

- Met with more than 20 lawmakers to discuss OOTA advocacy priorities and had lunch with Missy Anthony from OTPTAT Licensure Board. Also attended committee hearings to observe legislative process.
- A panel of OOTA Board Members provided a panel presentation to the Ohio House Medicaid Committee titled ‘The Role of OT Providers in Ohio’s Medicaid Program’ that was well received by committee members.

Legislative Actions

- Met with Lawmakers to discuss scope of practice updates, changes to behavioral health coverage, and other issues. Set up action for Lame Duck on amendments to HB 59 (Licensure Omnibus)
- Offered testimony in support of HB 141 (Prescribed Pediatric Extended Care Centers) and HB 220 (Reform Prior Authorization Processes); provided guidance and concerns with HB 453 (Autism Insurance Coverage).
- Monitored nearly 50 pieces of legislation impacting occupational therapy providers, Medicaid and health insurance coverage, and patient protections and support.

Medicaid Issues

- Worked with Ohio Medicaid and managed care plans to address member issues that were raised
- Monitored executive actions related to Medicaid coverage, home care and electronic visit verification, and future federal cuts

Presidents Report

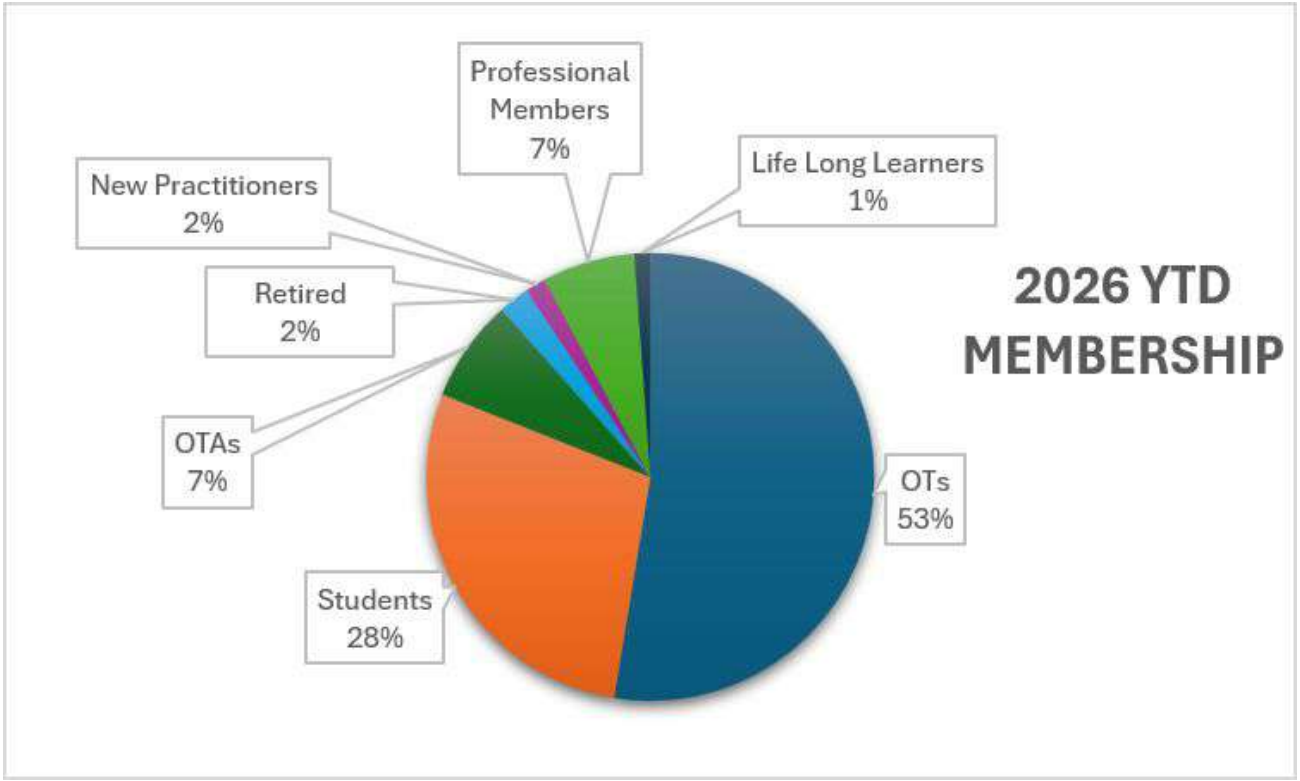
Christie Tuttle, M.S., COTA/L, ROH

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OOTA MEMBERSHIP – GROWING!

MEMBER LEVEL	YTD 2026	YTD 2025
OTs	637	574
Students	344	307
OTAs	90	110
Retired	27	22
New Practitioners	18	21
Professional Members	81	31
Life Long Learners	14	14
TOTAL YEAR-TO-DATE	**1211**	**1079**



Licensed practitioners in Ohio:

- 8,164 Occupational Therapists (298 **MORE** than in 2025)
  - ~8.5% of OT licensees are members
  - 16 Occupational Therapist Compact License

- 4,561 Occupational Therapy Assistants (302 **LESS** than in 2025)
  - ~1.8% of OTA licensees are members
  - Nearly 7.2% of OTAs nationally are licensed in Ohio
  - 6 Occupational Therapy Assistant Compact License

Board Member Changes

- **Career Develoment-**Alyssa DeCarlo, MS, OTR/L, MSCS,CSRS, LSVT
- **Conference Co- Chair**-Ali Williams, OTD, OTR/L
- **Older Adults SIS**-Open
- **Peds SIS-**Open
- **North Central District Chair**-In transition
- **OOTA Representative to the Otptat Board**-Amanda Rhodes, MOT, OTR/L
- **SW District Co-Chair**-Lori McAleer, MHA, OTR/L

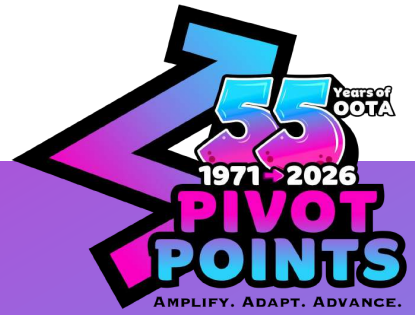
OOTA 2026 Year in Review
Updated Mission & Vision

MISSION

- The mission of the Ohio Occupational Therapy Association, Inc. is to connect Ohio occupational therapy practitioners with education, advocacy, and professional community support they need to deliver client-centered and evidence-informed care.

VISION

- The vision of the Ohio Occupational Therapy Association, Inc. is to affirm occupational therapy practitioners as essential contributors to healthcare and community well-being throughout Ohio.



OOTA

OOTA 2026 Year in Review
Special Events

HOSTED IN 2026

- Feeding Symposium
- Student Conclave
- Mental Health First Aid Training
- Winterfest

OOTA 2026 Year in Review
CEs Supported

Our *new* Learning Management System has facilitated us providing more CEs and virtual learning opportunities than ever before…

- Over 115 courses presented
- Over 631 learners
- Over 9,562 Contact hours processed through OOTA

OOTA 2026 Year in Review - New Benefits

OOTA has added new benefits for members in 2026

- Mentorship Program
- Book Club
- Newsletter
- Research Funding Digest
- Microcredentials – the first will be available right after conference!

OOTA Involved In Ohio Advocacy!

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 2026









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Leadership Expanding

New Energy – New Committees

- Career Development SIS
- Mentorship Committee & Program
- Micro Credentialing Committee
- Newsletter Committee – PRODUCING 4 ISSUES
- Re-energized: Education & Research SIS
- Re-energized: Rehab SIS
- OPENING – Older Adults SIS

Rehab SIS Updates

Oct 7 Q meeting: sharing of ideas & resources

Collaboration with AOTA

2027 Q online meetings: Jan 27, Apr 27, Jul 28, Oct 29

Please reach out with

- Ideas
- resources to share
- interest in sharing stories and/or expertise

It takes all of us working together to make a difference!

GPS/Fab Collab update

We continue to experience growth and opportunities with support from staff:

- We engaged in Strategic Planning and continue to advance the plan!
- Assets have grown significantly
- Membership is up
- Engagement has grown – more people doing more things
- It is expected we will be able to continue to enjoy support of staff, even as the grant expires

OOTA Created It's OWN Landing Spot for Conference This Year

All Sessions and the details can be found on the website

- Look at the schedule – click on the title of the session for which you want more information
- Provide EVALUATIONS for each session to provide speakers with valuable feedback
- Indicate which sessions you have attended and certificates will be sent to you

SCAN ME



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Representative Assembly

- The Role of the RA is to set professional standards and policies for occupational therapy
- The RA acts on policies, position statements, and official documents brought before it by members
- The Representative Assembly (RA) motion process spans the entire year, as Requests for Action (RFAs) may be submitted at any time. With one meeting scheduled, the 2026 cycle concluded with voting at the Spring meeting in April of 2026.



RA Updates

Routine Governance and SOP Actions

1. Motion 01-04152026: Revisions to the Commission on Education (COE) Standard Operating Procedure were adopted.
2. Motion 02-04152026: Updated Standard Operating Procedures for the Academic Leadership Councils (AFWC-ALC, DCC-ALC, OT-ALC, and OTA-ALC) were adopted.
3. Motion 03-04152026: Revisions to the Commission on Practice (COP) Standard Operating Procedure were adopted.
4. Motion 15-04152026: Updated Representative Assembly Standard Operating Procedures and RA Leadership Position Descriptions were adopted to align with the 2024 AOTA Bylaws revisions.

RA Updates

Practice Guidance and Professional Resources

5. Motion 09-04152026: Revised Guidelines for Reentry into the Field of Occupational Therapy were adopted. These updates will move forward for implementation and dissemination to support **practitioners reentering practice.**

6. Motion 12-04152026: Development of a statement and/or practice resource addressing the role of occupational therapy in **vision remediation and interventions targeting visual functions across practice settings and populations was adopted.**

7. Motion 14-04152026: The Representative Assembly charged the Commission on Practice to develop a statement on the role of **occupational therapy practitioners in secondary and post-secondary transition**, including school-based services, vocational rehabilitation, post-secondary education, independent living, and community settings.

RA Updates

Requests Not Approved: Scope and Feasibility Considerations

8. Motion 04-04152026: A request for development of **AOTA Fact Sheets was not approved**.
9. Motion 06-04152026: A request to establish a standard waiting period for relationships with past clients was not approved.
10. Motion 07-04152026: A request for **national workload and caseload guidelines was not approved**.
11. Motion 13-04152026: A request to develop a standard on occupational therapy and **humanless driving** was not approved.

RA Contact Info

- Matthew Husband OTD, OTR/L
- Term began on July 1, 2024
- Contact Info:
  - matthew.husband@osumc.edu



Social Media

- Follow Us
- Engagement
- Student Ambassadors

2026 Growth	Facebook	Instagram	Linkedin
Difference	69	170	99
Follower Growth Rate	4.34%	34.41%	16.50%

Career Development Special Interest Section

Officially kicked off July 7, 2026 and will hold quarterly meetings.

- Most recent meeting: October 6, 2026
- Next meeting: Q1 2027 - Date TBD

Sub-sections developed targeting:

- Mentorship - 1st cohort of the mentorship program completed!
- Job Support
- Student Support
- Higher Education
- Continuing Education

New page on OOTA's SIS website with more details and sign up's for participation in the above sub-sections available!

Student Involvement Committee

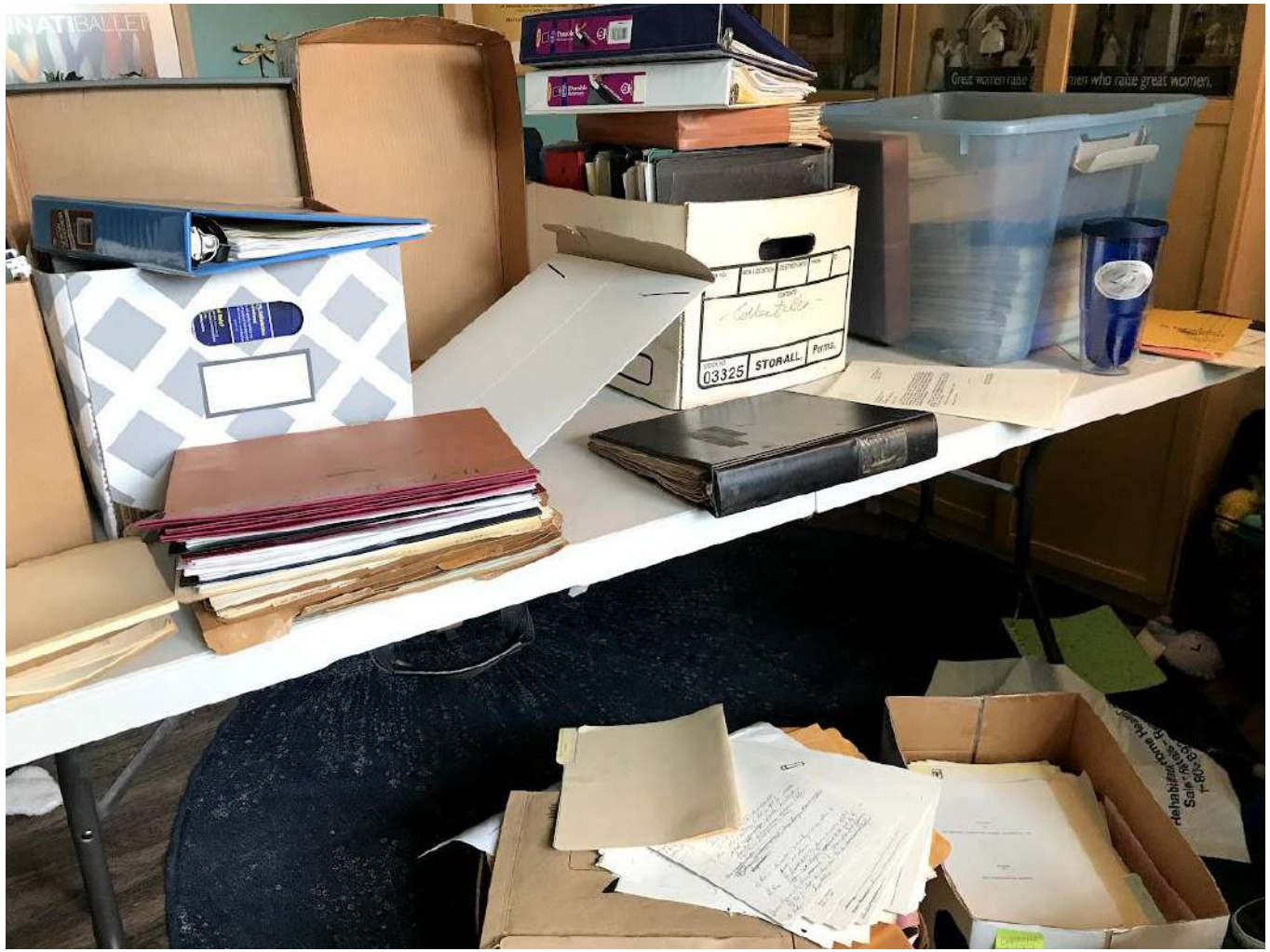
Student Webpage

Interest Survey for Student Conclave 2027

Central District Board Updates

- Establishing task/committee groups within our board
- Working to implement suggestions from the district survey we sent out earlier this year
  - More hybrid options for CEU events
  - Social and networking gatherings for district
  - Lunch and learn CEU events
- Always recruiting new members for the board! Bailey.Peters@osumc.edu

OOTA Historical Documents



OOTA Historical Documents



OOTA Historical Documents

OOTA History

Scan QR code to browse snapshots of OOTA's History!

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Abigal Dumm	Ashley Elma	Rebekah Reynolds
Ohio State University	Xavier University	Ohio State University

AOTF Scholarship Winners!!!

2027 Applications open in January

2026 OOTA Award Winners

Miranda Walker
Brianna Gaietto
Erika Eustaquio
Alexandra Henry
Maia Lynch
Anna Fox
Alessia Black
Miami Valley Hospital
Dodd Rehabilitation Hospital
Rebekah Bourgeios
Erika Kemp
Danielle Nelson
Krystin Turner
Pam Dixon
Bridget Farrell
Lisa Loveless
Dr. Beth Ann Hatkevich
Cheryl Boop

2026 OOTA Award Winners

Ann Bartman
Kara Brogan
Danielle McClelland Shrimpton
Danielle Griffin
Nathan Grizenko
Pam Turnwald
Barbara Elleman
Heather Swartz
Cheryl Albrechta

Alyssa DeCarlo
Ali Williams
Tara Brock
Bonnie Boenig
Jill Tonneman
Marnie Renda
Leah Dunn
Toni Durban
Steven Habimana

THANK YOU!

Christie Tuttle M.S., COTA/L, ROH

christie.tuttle.ot@gmail.com

We amplify, adapt, and advance occupational therapy, together.

