

AGENDA ITEM 9

REPORT FROM THE AD HOC SUNSET REVIEW COMMITTEE.

INCLUDES THE FOLLOWING:

- 9.1 AUGUST 8, 2025, AD HOC SUNSET REVIEW COMMITTEE MEETING HIGHLIGHTS.
- 9.2 SECTION 1 DRAFT OF THE SUNSET REPORT.
- 9.3 SECTION 3 DRAFT OF THE SUNSET REPORT.



AD HOC SUNSET REVIEW COMMITTEE HIGHLIGHTS

Committee Members Present

Beata Morcos (Chair) (Board President)
Christine Wietlisbach (Board Vice President)
Richard Bookwalter (Board Secretary)

Board Staff Present

Austin Porter, Executive Officer
Jody Quesada Novey, Manager
Karina Clark, Analyst

Friday, August 8, 2025

1:00 pm – Committee Meeting

1. Call to order, roll call, establishment of a quorum.

The meeting was called to order at 1:00 pm, roll was called, and a quorum was established.

2. Chairperson's Remarks – Informational only; no action to be taken.

Chairperson Beata Morcos welcomed all in attendance and thanked everybody for taking time out of their busy day to attend.

3. Committee Member Remarks – Informational only; no action to be taken.

There were no committee remarks.

4. Public Comment for Items not on the Agenda.

Ada Boone Hoerl, Program Director of the Sacramento City College Occupational Therapy Assistant (OTA) program introduced herself and stated she was happy to be in attendance.

Ryan Tacher from the Department of Consumer Affairs (DCA) Legislative Office introduced himself and offered his assistance, if needed.

Candace Chapman, Occupational Therapy of California (OTAC) Treasurer introduced herself and added that she was grateful to be in attendance.

Samia Rafeedie, OTAC President introduced herself and expressed that she was grateful for the work of the committee.

5. Consideration and review of previous issues identified in the 2022 Sunset Report and possible recommendation to the Board regarding prioritization of those issues and responses to be included in the Board's 2026 Sunset Report.

Executive Officer Austin Porter reviewed 15 prior Sunset issues from 2016 and 2022 to receive feedback from Board members as to whether they were satisfied that the issues had been successfully resolved or needed more attention.

6. Consideration and possible recommendation to the Board on the identification and development of new issues to be presented in the Board's 2026 Sunset Report.

There was no discussion on Agenda Item 6.

7. Consideration and possible recommendation to the Board on legislative proposals to include in the Board's 2026 Sunset Report, including amendments to Business and Professions Code 2570.16 to make separate and increase the renewal fees for both occupational therapist and occupational therapy assistant licenses.

The following were listed as recommended legislative proposals to include in the Board's 2026 Sunset Report.

- Legislative proposal to update the supervising ratios with previously approved language
- Legislative proposal for fee increase
- Legislative proposal to delegate authority to EO to order a psychological evaluation on behalf of Board members.

It was suggested by the committee that Board staff review all outstanding changes to the Practice Act, bring before the Board and then if approved by the Board, include those in the 2026 Sunset Report.

8. Review and possible recommendation to the Board to approve completed portions of the draft 2026 Sunset Report.

The summarized changes in Sections 1 and 3 are as follows:

Section 1

- Page 12 – Board Member Roster Table under Denise Miller should read 12/31/2023 and term expiration for Board President Beata Morcos should read 12/31/2026.
- Page 14 – The Board members are in regular communication with NBCOT regarding the practice analysis in reference to the development of the exam questions. The questions are revised and updated accordingly.
- Page 14 – paragraph 3, line 2 should read "California licensed occupational therapy practitioners..."
- Page 13 – Correct the Executive Officer's month of appointment.

Section 3

- Page 1 – Verify the number in Table 7a with the paragraph above it; replace ranges with a set value.
- Page 7 – complete the military questions.
- Page 10 – Clarify the percentage, use "at least 10%"

Chair Beata Morcos thanked all in attendance for their contributions. Ms. Morcos advised that meeting mid-late October after the September Board meeting would be ideal.

Adjournment.

The committee meeting adjourned at 2:50 p.m.

Section 1

Background and Description of the Board and Regulated Profession

Provide a short explanation of the history and function of the board.¹ Describe the occupations/professions that are licensed and/or regulated by the board (Practice Acts vs. Title Acts).²

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

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.

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.

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.

¹ The term "board" in this document refers to a board, bureau, commission, committee, council, department, division, program, or agency, as applicable. Please change the term "board" throughout this document to appropriately refer to the entity being reviewed.

² The term "license" in this document includes a license, certificate, permit or registration.

1. Describe the make-up and functions of each of the board's committees (cf., Section 12, Attachment B).

A thorough description of the Board's committees, their make-up, and procedures can be found in Chapters 6 and 7 the Board's Board Member Guidelines and Procedures Manual (Attachment A). A current listing of members of each of the Board's standing and ad hoc committees can be found in Attachment B.

The Board has no committee(s) specified in statute. However, the Board has established four standing committees which serve as an essential component to help the Board address specific policy and/or administrative issues. These issues may be referred to committee by the Board to delve into a specific policy issue, to address the concerns of the public or licensees, or on the recommendation of Board staff.

Each committee must be chaired by a member of the Board who will oversee the meetings and work with the Board's Executive Officer to develop meeting agendas and materials. No Board member may serve on more than 2 committees concurrently and committee member terms are 2 years with a maximum of two full, consecutive terms.

Board members serving on committees are entitled to per diem for committee meeting attendance and preparation as well as travel expense reimbursement. Committee members that do not also serve on the Board are entitled to travel expense reimbursement but shall not otherwise be compensated for meeting attendance and preparation.

The Board may also establish ad hoc committees as needed for the Board and its standing committees.

The Board's four standing committees, all of which are subject to the requirements of the Open Meetings Act (with the exception of the Administrative Committee), are as follows:

Administrative Committee

Provides guidance to staff for the budgeting and operational issues of the Board, provides suggestions regarding the Board's Strategic Plan, reviews legislative position letters on behalf of the Board for approval and submission, and performs other administrative duties as required.

**Members of this committee are not subject to the term limits specified above.*

Education and Outreach Committee

Develops consumer and licensee outreach projects, including the Board's newsletter, website, e-government initiatives, and outside organization presentations. Committee members may be asked to represent the Board at meetings, conferences, health, career or job fairs, or at the invitation of outside organizations and programs.

Legislative and Regulatory Affairs Committee

Provides information and/or makes recommendations to the Board and committees on matters relating to legislation and regulations.

Practice Committee

Reviews and provides recommended responses to the Board on various practice issues/questions submitted by licensees and consumers, provides guidance to staff on continuing competency audits, reviews and provides recommendations to the Board on practice-related proposed regulatory amendments, and reviews and provides recommendations to Board staff on revisions to various applications and forms used by the Board.

Appointment Date includes date first appointed and most recent reappointment date, if applicable.

Table 1.a.1 Attendance

Richard Bookwalter

Appointed: 3/5/2014, 5/4/2021

Meeting Type	Meeting Date	Meeting Location	Attended?
Ad Hoc Sunset Committee	9/1/2021	Virtual	YES
Board Meeting	9/13/2021	Virtual	YES
Ad Hoc Sunset Committee	10/14/2021	Virtual	YES
Board Meeting	10/21/2021	Virtual	YES
Board Meeting	11/4/2021	Virtual	YES
Board Meeting	11/5/2021	Virtual	YES
Ad Hoc Sunset Committee	11/16/2021	Virtual	YES
Board Meeting	12/1/2021	Virtual	YES
Board Meeting	2/15/2022	Virtual	YES
Board Meeting	5/19/2022	Carson, CA	YES
Board Meeting	5/20/2022	Carson, CA	YES
Board Meeting	7/27/2022	Virtual	YES
Board Meeting	8/18/2022	Virtual	YES
Board Meeting	8/19/2022	Virtual	YES
Board Meeting	11/3/2022	San Marcos, CA	YES
Board Meeting	11/4/2022	San Marcos, CA	YES
Board Meeting	12/14/2022	Virtual	YES
Board Meeting	2/9/2023	Sacramento, CA (Hybrid)	YES
Board Meeting	2/10/2023	Sacramento, CA (Hybrid)	YES
Board Meeting	4/13/2023	Virtual	YES
Board Meeting	5/18/2023	San Marcos, CA	YES
Board Meeting	5/19/2023	San Marcos, CA	YES
Board Meeting	8/24/2023	Oakland, CA	YES
Board Meeting	8/25/2023	Oakland, CA	YES
Practice Committee	10/13/2023	Virtual	YES
Board Meeting	11/2/2023	Glendale, CA	YES
Board Meeting	11/3/2023	Glendale, CA	YES
Practice Committee	12/8/2023	Virtual	YES
Board Meeting	12/13/2023	Virtual	YES
Ad Hoc DPR Committee	2/8/2024	San Marcos, CA	YES
Board Meeting	2/8/2024	San Marcos, CA	YES
Board Meeting	2/9/2024	San Marcos, CA	YES
Practice Committee	3/1/2024	Virtual	YES
Leg Reg Affairs Committee	3/13/2024	Virtual	YES
Ad Hoc DPR Committee	4/10/2024	Virtual	YES
Leg Reg Affairs Committee	4/24/2024	Virtual	YES
Ad Hoc DPR Committee	4/29/2024	Virtual	YES
Board Meeting	5/2/2024	Sacramento, CA (Hybrid)	YES
Board Meeting	5/3/2024	Sacramento, CA (Hybrid)	YES
Practice Committee	6/21/2024	Virtual	YES

Practice Committee	8/2/2024	Virtual	YES
Board Meeting	8/22/2024	Riverside, CA (Hybrid)	YES
Board Meeting	8/23/2024	Riverside, CA (Hybrid)	YES
Practice Committee	10/11/2024	Virtual	YES
Board Meeting	11/14/2024	San Rafael, CA	YES
Board Meeting	11/15/2024	San Rafael, CA	YES
Board Meeting	12/13/2024	Sacramento, CA	YES
Ad Hoc DPR Committee	1/15/2025	Virtual	YES
Board Meeting	1/24/2025	Sacramento, CA	YES
Board Meeting	2/14/2025	Virtual	YES
Board Meeting	3/6/2025	Claremont, CA (Hybrid)	YES
Board Meeting	3/7/2025	Claremont, CA (Hybrid)	YES
Ad Hoc DPR Committee	4/16/2025	Virtual	YES
Practice Committee	4/25/2025	Virtual	YES
Board Meeting	5/23/2025	Virtual	YES
Board Meeting	6/12/2025	Hybrid	YES
Board Meeting	6/13/2025	Hybrid	YES

*Attendance prior to Fiscal Year 21/22 reported in the last Sunset Review.

Table 1.a.2 Attendance

Hector Cabrera

Appointed: 5/6/2022

Meeting Type	Meeting Date	Meeting Location	Attended?
Board Meeting	8/18/2022	Virtual	NO
Board Meeting	8/19/2022	Virtual	NO
Board Meeting	11/3/2022	San Marcos, CA	YES
Board Meeting	11/4/2022	San Marcos, CA	YES
Board Meeting	12/14/2022	Virtual	YES
Board Meeting	2/9/2023	Sacramento, CA (Hybrid)	YES
Board Meeting	2/10/2023	Sacramento, CA (Hybrid)	NO
Board Meeting	4/13/2023	Virtual	YES
Board Meeting	5/18/2023	San Marcos, CA	YES
Board Meeting	5/19/2023	San Marcos, CA	YES
Board Meeting	8/24/2023	Oakland, CA	YES
Board Meeting	8/25/2023	Oakland, CA	YES
Ad Hoc Non-Licensee Comm.	10/12/2023	Virtual	NO
Board Meeting	11/2/2023	Glendale, CA	YES
Board Meeting	11/3/2023	Glendale, CA	YES
Board Meeting	12/13/2023	Virtual	YES
Ad Hoc DPR Committee	2/8/2024	San Marcos, CA	YES
Board Meeting	2/8/2024	San Marcos, CA	YES
Board Meeting	2/9/2024	San Marcos, CA	YES
Ad Hoc DPR Committee	4/10/2024	Virtual	YES

Ad Hoc DPR Committee	4/29/2024	Virtual	NO
Board Meeting	5/2/2024	Sacramento, CA (Hybrid)	YES
Board Meeting	5/3/2024	Sacramento, CA (Hybrid)	YES
Ad Hoc Non-Licensee Comm.	8/5/2024	Virtual	NO
Board Meeting	8/22/2024	Riverside, CA (Hybrid)	NO
Board Meeting	8/23/2024	Riverside, CA (Hybrid)	NO
Board Meeting	11/14/2024	San Rafael, CA	NO
Board Meeting	11/15/2024	San Rafael, CA	NO
Board Meeting	12/13/2024	Sacramento, CA	YES
Ad Hoc DPR Committee	1/15/2025	Virtual	YES
Board Meeting	1/24/2025	Sacramento, CA	NO
Board Meeting	2/14/2025	Virtual	YES
Board Meeting	3/6/2025	Claremont, CA (Hybrid)	YES
Board Meeting	3/7/2025	Claremont, CA (Hybrid)	YES
Ad Hoc DPR Committee	4/16/2025	Virtual	YES
Board Meeting	5/23/2025	Virtual	YES
Board Meeting	6/12/2025	Hybrid	YES
Board Meeting	6/13/2025	Hybrid	YES

Table 1.a.3 Attendance

Lynna Do

Appointed: 7/25/2020, 1/16/2025

Meeting Type	Meeting Date	Meeting Location	Attended?
Fieldwork Comm. Workgroup	7/26/2021	Virtual	YES
Fieldwork Comm. Workgroup	8/9/2021	Virtual	YES
Board Meeting	9/13/2021	Virtual	YES
Board Meeting	10/21/2021	Virtual	YES
Board Meeting	11/4/2021	Virtual	YES
Board Meeting	11/5/2021	Virtual	YES
Board Meeting	12/1/2021	Virtual	YES
Board Meeting	2/15/2022	Virtual	YES
Board Meeting	5/19/2022	Carson, CA	YES
Board Meeting	5/20/2022	Carson, CA	YES
Board Meeting	7/27/2022	Virtual	YES
Board Meeting	8/18/2022	Virtual	YES
Board Meeting	8/19/2022	Virtual	YES
Board Meeting	11/3/2022	San Marcos, CA	NO
Board Meeting	11/4/2022	San Marcos, CA	NO
Board Meeting	12/14/2022	Virtual	YES
Board Meeting	2/9/2023	Sacramento, CA (Hybrid)	YES
Board Meeting	2/10/2023	Sacramento, CA (Hybrid)	YES
Board Meeting	4/13/2023	Virtual	NO

Board Meeting	5/18/2023	San Marcos, CA	YES
Board Meeting	5/19/2023	San Marcos, CA	YES
Board Meeting	8/24/2023	Oakland, CA	YES
Board Meeting	8/25/2023	Oakland, CA	YES
Practice Committee	10/13/2023	Virtual	NO
Board Meeting	11/2/2023	Glendale, CA	NO
Board Meeting	11/3/2023	Glendale, CA	NO
Practice Committee	12/8/2023	Virtual	NO
Board Meeting	12/13/2023	Virtual	YES
Ad Hoc Budget Committee	12/18/2023	Virtual	YES
Board Meeting	2/8/2024	San Marcos, CA	YES
Board Meeting	2/9/2024	San Marcos, CA	YES
Practice Committee	3/1/2024	Virtual	NO
Leg Reg Affairs Committee	3/13/2024	Virtual	YES
Leg Reg Affairs Committee	4/24/2024	Virtual	YES
Board Meeting	5/2/2024	Sacramento, CA (Hybrid)	YES
Board Meeting	5/3/2024	Sacramento, CA (Hybrid)	YES
Practice Committee	6/21/2024	Virtual	NO
Practice Committee	8/2/2024	Virtual	NO
Board Meeting	8/22/2024	Riverside, CA (Hybrid)	YES
Board Meeting	8/23/2024	Riverside, CA (Hybrid)	NO
Practice Committee	10/11/2024	Virtual	NO
Board Meeting	11/14/2024	San Rafael, CA	NO
Board Meeting	11/15/2024	San Rafael, CA	NO
Board Meeting	12/13/2024	Sacramento, CA	YES
Board Meeting	1/24/2025	Sacramento, CA	YES
Board Meeting	2/14/2025	Virtual	YES
Board Meeting	3/6/2025	Claremont, CA (Hybrid)	YES
Board Meeting	3/7/2025	Claremont, CA (Hybrid)	YES

*Attendance prior to Fiscal Year 21/22 reported in the last Sunset Review.

*Resigned on March 13, 2025.

Table 1.a.4 Attendance

Jeff Ferro

Appointed: 1/30/2014, 12/11/2017

Meeting Type	Meeting Date	Meeting Location	Attended?
Board Meeting	9/13/2021	Virtual	YES
Board Meeting	10/21/2021	Virtual	YES
Board Meeting	11/4/2021	Virtual	YES
Board Meeting	11/5/2021	Virtual	YES
Board Meeting	12/1/2021	Virtual	YES

*Attendance prior to Fiscal Year 21/22 reported in the last Sunset Review.

Table 1.a.5 Attendance

Denise Miller

Appointed: 5/15/2013, 1/22/2021

Meeting Type	Meeting Date	Meeting Location	Attended?
Fieldwork Comm. Workgroup	7/26/2021	Virtual	YES
Fieldwork Comm. Workgroup	8/9/2021	Virtual	YES
Ad Hoc Sunset Committee	9/1/2021	Virtual	YES
Board Meeting	9/13/2021	Virtual	YES
Ad Hoc Sunset Committee	10/14/2021	Virtual	YES
Board Meeting	10/21/2021	Virtual	YES
Board Meeting	11/4/2021	Virtual	YES
Board Meeting	11/5/2021	Virtual	YES
Ad Hoc Sunset Committee	11/16/2021	Virtual	YES
Board Meeting	12/1/2021	Virtual	YES
Board Meeting	2/15/2022	Virtual	YES
Board Meeting	5/19/2022	Carson, CA	YES
Board Meeting	5/20/2022	Carson, CA	YES
Board Meeting	7/27/2022	Virtual	YES
Board Meeting	8/18/2022	Virtual	YES
Board Meeting	8/19/2022	Virtual	YES
Board Meeting	11/3/2022	San Marcos, CA	YES
Board Meeting	11/4/2022	San Marcos, CA	YES
Board Meeting	12/14/2022	Virtual	YES
Board Meeting	2/9/2023	Sacramento, CA (Hybrid)	YES
Board Meeting	2/10/2023	Sacramento, CA (Hybrid)	YES
Administrative Committee	3/22/2023	Virtual	YES
Board Meeting	4/13/2023	Virtual	YES
Board Meeting	5/18/2023	San Marcos, CA	YES
Board Meeting	5/19/2023	San Marcos, CA	YES
Administrative Committee	8/18/2023	Burbank, CA	YES
Board Meeting	8/24/2023	Oakland, CA	YES
Board Meeting	8/25/2023	Oakland, CA	YES
Administrative Committee	9/29/2023	Burbank, CA	YES
Board Meeting	11/2/2023	Glendale, CA	YES
Board Meeting	11/3/2023	Glendale, CA	YES
Board Meeting	12/13/2023	Virtual	YES
Ad Hoc Budget Committee	12/18/2023	Virtual	YES
Board Meeting	2/8/2024	San Marcos, CA	YES
Board Meeting	2/9/2024	San Marcos, CA	YES
Ad Hoc Supervision Standards	4/12/2024	Virtual	YES
Board Meeting	5/2/2024	Sacramento, CA (Hybrid)	YES
Board Meeting	5/3/2024	Sacramento, CA (Hybrid)	YES
Ad Hoc Supervision Standards	6/26/2024	Virtual	YES
Ad Hoc Supervision Standards	8/14/2024	Virtual	YES

Board Meeting	8/22/2024	Riverside, CA (Hybrid)	YES
Board Meeting	8/23/2024	Riverside, CA (Hybrid)	YES
Ad Hoc Supervision Standards	9/17/2024	Virtual	YES
Ad Hoc Supervision Standards	9/25/2024	Virtual	YES
Ad Hoc Supervision Standards	10/23/2024	Virtual	YES
Board Meeting	11/14/2024	San Rafael, CA	YES
Board Meeting	11/15/2024	San Rafael, CA	YES
Board Meeting	12/13/2024	Sacramento, CA	YES

*Attendance prior to Fiscal Year 21/22 reported in the last Sunset Review.

Table 1.a.6 Attendance

Beata Morcos

Appointed: 5/19/2015, 5/18/2023

Meeting Type	Meeting Date	Meeting Location	Attended?
Ad Hoc Sunset Committee	9/1/2021	Virtual	YES
Board Meeting	9/13/2021	Virtual	YES
Ad Hoc Sunset Committee	10/14/2021	Virtual	YES
Board Meeting	10/21/2021	Virtual	YES
Board Meeting	11/4/2021	Virtual	YES
Board Meeting	11/5/2021	Virtual	YES
Ad Hoc Sunset Committee	11/16/2021	Virtual	YES
Board Meeting	12/1/2021	Virtual	YES
Board Meeting	2/15/2022	Virtual	YES
Board Meeting	5/19/2022	Carson, CA	YES
Board Meeting	5/20/2022	Carson, CA	YES
Board Meeting	7/27/2022	Virtual	YES
Board Meeting	8/18/2022	Virtual	YES
Board Meeting	8/19/2022	Virtual	YES
Board Meeting	11/3/2022	San Marcos, CA	YES
Board Meeting	11/4/2022	San Marcos, CA	YES
Board Meeting	12/14/2022	Virtual	YES
Board Meeting	2/9/2023	Sacramento, CA (Hybrid)	YES
Board Meeting	2/10/2023	Sacramento, CA (Hybrid)	YES
Administrative Committee	3/22/2023	Virtual	YES
Board Meeting	4/13/2023	Virtual	YES
Board Meeting	5/18/2023	San Marcos, CA	YES
Board Meeting	5/19/2023	San Marcos, CA	YES
Administrative Committee	8/18/2023	Burbank, CA	YES
Board Meeting	8/24/2023	Oakland, CA	YES
Board Meeting	8/25/2023	Oakland, CA	YES
Administrative Committee	9/29/2023	Burbank, CA	YES
Ad Hoc Non-Licensee Comm.	10/12/2023	Virtual	YES
Board Meeting	11/2/2023	Glendale, CA	YES
Board Meeting	11/3/2023	Glendale, CA	YES
Board Meeting	12/13/2023	Virtual	YES
Board Meeting	2/8/2024	San Marcos, CA	YES

Board Meeting	2/9/2024	San Marcos, CA	YES
Ad Hoc Supervision Standards	4/12/2024	Virtual	YES
Board Meeting	5/2/2024	Sacramento, CA (Hybrid)	YES
Board Meeting	5/3/2024	Sacramento, CA (Hybrid)	YES
Ad Hoc Supervision Standards	6/26/2024	Virtual	NO
Ad Hoc Non-Licensee Comm.	8/5/2024	Virtual	YES
Ad Hoc Supervision Standards	8/14/2024	Virtual	YES
Board Meeting	8/22/2024	Riverside, CA (Hybrid)	YES
Board Meeting	8/23/2024	Riverside, CA (Hybrid)	YES
Ad Hoc Supervision Standards	9/17/2024	Virtual	YES
Ad Hoc Supervision Standards	9/25/2024	Virtual	NO
Ad Hoc Supervision Standards	10/23/2024	Virtual	YES
Board Meeting	11/14/2024	San Rafael, CA	YES
Board Meeting	11/15/2024	San Rafael, CA	YES
Board Meeting	12/13/2024	Sacramento, CA	YES
Board Meeting	1/24/2025	Sacramento, CA	YES
Board Meeting	2/14/2025	Virtual	YES
Board Meeting	3/6/2025	Claremont, CA (Hybrid)	YES
Board Meeting	3/7/2025	Claremont, CA (Hybrid)	YES
Board Meeting	5/23/2025	Virtual	YES
Board Meeting	6/12/2025	Hybrid	YES
Board Meeting	6/13/2025	Hybrid	YES

*Attendance prior to Fiscal Year 21/22 reported in the last Sunset Review.

Table 1.a.7 Attendance

Sharon Pavlovich

Appointed: 8/16/2013, 1/21/2021

Meeting Type	Meeting Date	Meeting Location	Attended?
Ad Hoc OTD Committee	8/16/2021	Virtual	YES
Ad Hoc Sunset Committee	9/1/2021	Virtual	YES
Board Meeting	9/13/2021	Virtual	YES
Ad Hoc OTD Committee	10/6/2021	Virtual	YES
Ad Hoc Sunset Committee	10/14/2021	Virtual	YES
Board Meeting	10/21/2021	Virtual	YES
Board Meeting	11/4/2021	Virtual	YES
Board Meeting	11/5/2021	Virtual	YES
Ad Hoc Sunset Committee	11/16/2021	Virtual	YES
Board Meeting	12/1/2021	Virtual	YES
Board Meeting	2/15/2022	Virtual	YES
Board Meeting	5/19/2022	Carson, CA	YES
Board Meeting	5/20/2022	Carson, CA	YES
Board Meeting	7/27/2022	Virtual	YES
Board Meeting	8/18/2022	Virtual	YES
Board Meeting	8/19/2022	Virtual	YES

Board Meeting	11/3/2022	San Marcos, CA	YES
Board Meeting	11/4/2022	San Marcos, CA	NO
Board Meeting	12/14/2022	Virtual	YES
Board Meeting	2/9/2023	Sacramento, CA (Hybrid)	YES
Board Meeting	2/10/2023	Sacramento, CA (Hybrid)	YES
Board Meeting	4/13/2023	Virtual	YES
Board Meeting	5/18/2023	San Marcos, CA	YES
Board Meeting	5/19/2023	San Marcos, CA	NO
Board Meeting	8/24/2023	Oakland, CA	YES
Board Meeting	8/25/2023	Oakland, CA	YES
Ad Hoc Non-Licensee Comm.	10/12/2023	Virtual	YES
Board Meeting	11/2/2023	Glendale, CA	YES
Board Meeting	11/3/2023	Glendale, CA	YES
Board Meeting	12/13/2023	Virtual	YES
Board Meeting	2/8/2024	San Marcos, CA	YES
Board Meeting	2/9/2024	San Marcos, CA	YES
Ad Hoc Supervision Standards	4/12/2024	Virtual	YES
Board Meeting	5/2/2024	Sacramento, CA (Hybrid)	YES
Board Meeting	5/3/2024	Sacramento, CA (Hybrid)	YES
Ad Hoc Supervision Standards	6/26/2024	Virtual	YES
Ad Hoc Non-Licensee Comm.	8/5/2024	Virtual	YES
Ad Hoc Supervision Standards	8/14/2024	Virtual	YES
Board Meeting	8/22/2024	Riverside, CA (Hybrid)	YES
Board Meeting	8/23/2024	Riverside, CA (Hybrid)	YES
Ad Hoc Supervision Standards	9/17/2024	Virtual	NO
Ad Hoc Supervision Standards	9/25/2024	Virtual	YES
Ad Hoc Supervision Standards	10/23/2024	Virtual	NO
Board Meeting	11/14/2024	San Rafael, CA	YES
Board Meeting	11/15/2024	San Rafael, CA	YES
Board Meeting	12/13/2024	Sacramento, CA	YES

*Attendance prior to Fiscal Year 21/22 reported in the last Sunset Review.

Table 1.a.8 Attendance

Christine Wietlisbach

Appointed: 5/12/2023

Meeting Type	Meeting Date	Meeting Location	Attended?
Board Meeting	5/18/2023	San Marcos, CA	YES
Board Meeting	5/19/2023	San Marcos, CA	YES
Board Meeting	8/24/2023	Oakland, CA	YES
Board Meeting	8/25/2023	Oakland, CA	YES
Practice Committee	10/13/2023	Virtual	YES
Board Meeting	11/2/2023	Glendale, CA	YES
Board Meeting	11/3/2023	Glendale, CA	YES
Practice Committee	12/8/2023	Virtual	YES

Board Meeting	12/13/2023	Virtual	YES
Board Meeting	2/8/2024	San Marcos, CA	YES
Board Meeting	2/9/2024	San Marcos, CA	YES
Practice Committee	3/1/2024	Virtual	YES
Leg Reg Affairs Committee	3/13/2024	Virtual	YES
Leg Reg Affairs Committee	4/24/2024	Virtual	YES
Board Meeting	5/2/2024	Sacramento, CA (Hybrid)	YES
Board Meeting	5/3/2024	Sacramento, CA (Hybrid)	YES
Practice Committee	6/21/2024	Virtual	YES
Practice Committee	8/2/2024	Virtual	YES
Board Meeting	8/22/2024	Riverside, CA (Hybrid)	YES
Board Meeting	8/23/2024	Riverside, CA (Hybrid)	YES
Practice Committee	10/11/2024	Virtual	YES
Board Meeting	11/14/2024	San Rafael, CA	YES
Board Meeting	11/15/2024	San Rafael, CA	YES
Board Meeting	12/13/2024	Sacramento, CA	NO
Board Meeting	1/24/2025	Sacramento, CA	YES
Board Meeting	2/14/2025	Virtual	YES
Board Meeting	3/6/2025	Claremont, CA (Hybrid)	YES
Board Meeting	3/7/2025	Claremont, CA (Hybrid)	YES
Practice Committee	4/25/2025	Virtual	YES
Board Meeting	5/23/2025	Virtual	YES
Board Meeting	6/12/2025	Hybrid	YES
Board Meeting	6/13/2025	Hybrid	YES

Table 1.b Board Member Roster

Member Name	Date First Appointed	Date Reappointed	Date Term Expires	Appointing Authority	Type (Public or Professional)
Current Members					
Arabit, Luis	9/10/2025		12/31/2027	Governor	Professional (OT)
Boone Hoerl, Ada	9/10/2025		12/31/2027	Governor	Professional (OTA)
Greco, Matthew	7/16/2025		12/31/2028	Senate Rules	Public
Morcos, Beata D.	5/19/2015	5/18/2023	12/31/2026	Governor	Public
Santos, Virginia	6/30/2025		12/31/2028	Assembly Speaker	Public
Schwier, Erin	9/10/2025		12/31/2028	Governor	Professional (OT)
Wietlisbach, Christine	5/12/2023		12/31/2026	Governor	Professional (OT)
Past Members					
Bookwalter, Richard	3/05/2014	5/04/2021	12/31/2024	Governor	Professional (OT)
Cabrera, Hector	5/06/2022		12/31/2024	Assembly Speaker	Public
Do, Lynna	7/25/2020	1/16/2025	Resigned 3/13/2025	Senate Rules	Public
Ferro, Jeff	1/30/2014	12/11/2017	12/31/2020	Assembly Speaker	Public
Miller, Denise	5/15/2013	1/22/2021	12/31/2023	Governor	Professional (OT)
Pavlovich, Sharon	8/16/2013	1/21/2021	12/31/2023	Governor	Professional (OTA)

2. In the past four years, was the board unable to hold any meetings due to lack of quorum? If so, please describe. Why? When? How did it impact operations?

With the expiration of both Former Member Pavlovich's and Former Member Miller's terms, followed by the resignation of Former Member Do, the Board required the attendance of all members to meet quorum. However, careful planning and commitment from the members allowed the Board to hold all planned meetings without quorum issues. The recent appointments of Member Santos and Member Greco made quorum easier to achieve. More recently, the Governor's Office appointed Members, Arabit, Boone Hoerl, and Schwier which has resulted in a

full Board, once again. The Board does not anticipate any issues meeting quorum now that all positions are filled.

3. Describe any major changes to the board since the last Sunset Review, including, but not limited to:

- Internal changes (i.e., reorganization, relocation, change in leadership, strategic planning)

The Board's former Executive Officer (EO), Heather Martin, retired in December 2024. Following Ms. Martin's retirement, Marc Mason was appointed to the EO position. Mr. Mason resigned in February 2025. Beginning on February 17, 2025, Austin Porter served as the Interim Executive Officer until being appointed to the Executive Officer position in June 2025. Mr. Porter is the Board's current Executive Officer.

The Board adopted its new Strategic Plan for 2025 – 2030 on March 6, 2025, which is included in Attachment E. As part of the development process, an environmental scan and analysis of the environment in which the Board operates were conducted. The environmental scan sought stakeholder input on the Board's performance in the areas of Enforcement, Applicant Qualifications, Laws and Regulations, Outreach and Communication, and Organizational Effectiveness. This process included sending a survey to more than 900 stakeholders, including people on the Board's interested parties list, other state occupational therapy boards, the California and national associations that represent the profession, and program directors of all California occupational therapy education programs.

- All legislation sponsored by the board and affecting the board since the last sunset review.

2021

AB 107 (Chapter 693, Statutes of 2021)- This bill expands the requirement to issue temporary licenses to practice a profession or vocation to include licenses issued by any board within the department. The bill requires a board to issue a temporary license within 30 days of receiving the required documentation, provided the results of a criminal background check do not show grounds for denial.

AB 1291 (Chapter 63, Statutes of 2021)- This bill requires a state body, when it limits time for public comment, to provide at least twice the allotted time to a member of the public who utilizes translating technology to address the state body. The bill additionally makes technical, nonsubstantive changes.

SB 607 (Chapter 367, Statutes of 2021)- This bill, on and after July 1, 2022, requires a board to waive the licensure application fee and the initial or original license fee for an applicant who holds a current license in another jurisdiction in the same profession or vocation and who supplies satisfactory evidence of being married to, or in a domestic partnership or other legal union with, an active duty member of the Armed Forces of the United States who is assigned to a duty station in California under official active duty military orders

2022

AB 2671 (Chapter 290, Statutes of 2022)- This bill increases the limit on the total number of occupational therapy assistants to 3 times the number of occupational therapists regularly employed by a facility at any one time. This bill extends the operation of the board to January 1, 2027, and makes clarifying organizational changes to the Occupational Therapy Act.

SB 731 (Chapter 814, Statutes of 2022)- This bill deals with the sealing of arrest records, which affects what can be seen on background reports and prohibits denial of a credential dependent upon the details outlined in varied conviction categories.

SB 1237 (Chapter 386, Statutes of 2022)- Existing law authorizes a licensee whose license expired while on active duty as a member of the California National Guard or United States Armed Forces to reinstate without penalty. Existing law also requires the Board to waive the renewal fees and other specified requirements of any licensee on similar active duty. This bill defines the phrase "called to active duty" to include active duty in the United States Armed Forces and on duty in the California National Guard, as specified.

2023

AB 883 (Chapter 348, Statutes of 2023)- This bill requires the board to expedite, and authorizes the board to assist in, the initial licensure process for an applicant who supplies satisfactory evidence to the board that the applicant is an active-duty member of a regular component of the Armed Forces of the United States enrolled in the United States Department of Defense SkillBridge program.

AB 1707 (Chapter 258, Statutes of 2023)- This bill prohibits a healing arts board under the Department of Consumer Affairs from denying an application for a license or imposing discipline upon a licensee or health care practitioner on the basis of a civil judgment, criminal conviction, or disciplinary action in another state that is based on the application of another state's law that interferes with a person's right to receive sensitive services, as defined, that would be lawful in this state, regardless of the patient's location.

SB 143 (Chapter 196, Statutes of 2023)- This bill requires a registering authority, defined as specified boards, bureaus, and commissions and the Department of Real Estate, to register a servicemember or a spouse of a servicemember who relocated to this state because of military orders for military service within this state and meets specified requirements. This bill reinstated Covid public meeting requirements through 12/31/2023 (e.g. remote address not on agenda).

SB 372 (Chapter 225, Statutes of 2023)- This bill requires the board to remove licensees' previous names and genders from website under specified circumstances.

SB 544 (Chapter 216, Statutes of 2023)- This bill changes teleconference requirements for board meetings, including one physical meeting location that is audible and a staff member present at that location.

2024

AB 1991 (Chapter 369, Statutes of 2024)- This bill requires a healing arts board, as defined, to require a licensee or registrant who electronically renews their license or registration to provide to that board the licensee's or registrant's individual National Provider Identifier, if they have one. The bill provides that a violation of the bill's requirements is not a crime.

2025

SB 470 (Chapter 222, Statutes of 2025)- The bill authorizes an additional, alternative set of provisions under which a state body may hold a meeting by teleconference. At least one member of the state body is physically present at each teleconference location, a majority of the members of the state body are physically present at the same teleconference location, and that members of the state body visibly appear on camera during the open portion of a meeting that is publicly accessible via the internet or other online platform. This bill authorizes, under specified circumstances, a member of the state body to participate pursuant to these provisions from a remote location, which would not be required to be accessible to the public and which the act prohibits the notice and agenda from disclosing.

AB 489 (Chapter 615, Statutes of 2025)- This bill makes provisions of law that prohibit the use of specified terms, letters, or phrases to falsely indicate or imply possession of a license or certificate to practice a health care profession, enforceable against an entity who develops or deploys artificial intelligence (AI) or generative artificial intelligence (GenAI) technology.

- All regulation changes approved by the board since the last sunset review. Include the status of each regulatory change approved by the board.

Filing of Addresses, Advanced Practice, Continuing Competency

Amend Sections: 4102, 4150, 4151, 4152, 4153, 4154, 4161, 4162

This regulatory change was approved by the Board in August 2023 and is currently in its 4th round of revision and review from legal and budget.

Enforcement Updates

Amend Sections: 4101, 4141, 4146, 4146.5, 4147, 4147.5, 4149.1

Add Sections: 4146.1, 4146.7, 4146.8, 4147.7, 4149.6, 4149.7

This regulatory change was approved by the Board in August 2023 and has run into issues with approval from legal. Board staff are currently focusing on making smaller packages to submit for approval so that more straightforward changes can be implemented while more complex ones are allowed time to be developed further.

Supervision Parameters

Amend Sections: 4180, 4181

This regulatory change was approved by the Board in November 2024 and has not yet had a package submitted.

Application and Renewal Attestation

Add Sections: 4110.1, 4122

This regulatory change was approved by the Board in August 2022 and has not yet had a package submitted.

Fee Increase

Amend Section: 4130

This regulatory change was approved by the Board in June 2025 and is currently awaiting approval from the Director of DCA.

Cost Recovery

Amend Section: 4147

Board to vote.

4. Describe any major studies conducted by the board (cf. Section 12, Attachment C).

The Board has not conducted any major studies since the last sunset review.

5. List the status of all national associations to which the board belongs.

The Board is a member of the Council on Licensure, Enforcement and Regulation (CLEAR) – CLEAR is an association of individuals, agencies and organizations that comprise the international community of professional and occupational regulation, providing a forum for improving the quality and understanding of regulation to enhance public protection.

- Does the board's membership include voting privileges?

The Board's CLEAR membership is part of a DCA's organizational membership and comes with voting privileges represented by a single organization vote.

- List committees, workshops, working groups, task forces, etc., on which the board participates.

The Board does not currently participate in any national committees, workshops, work groups, task forces, etc.

- How many meetings did board representative(s) attend? When and where?

The Board has not attended any CLEAR meetings since the last Sunset Review.

- If the board is using a national exam, how is the board involved in its development, scoring, analysis, and administration?

The Board uses the same national examinations used by all other state occupational therapy licensing boards and agencies: the National Board for Certification in Occupational Therapy's (NBCOT) Occupational Therapist Registered (OTR) and Certified Occupational Therapy Assistant (COTA) exams.

NBCOT conducts an occupational analysis (referred to by NBCOT as a practice analysis) for each exam every five years, with the most recent analysis for each exam having been conducted in 2022. While the Board is not directly involved in the development of the exams, Board members are in regular communication with NBCOT regarding the analysis as it relates to the development of exam content. Furthermore, California-licensed occupational therapy practitioners routinely serve on a panel of over 50 licensed professionals and faculty members as subject matter experts responsible for exam question development, review, validation, and revision.

Administration and scoring of the exams is done by NBCOT. Scores are reported to candidates as well as state regulatory agencies and prospective employers, should the candidate request this service.

Section 3

Licensing Program

Table 6. Licensee Population

		FY 2021/22	FY 2022/23	FY 2023/24	FY 2024/25
Occupational Therapist	Active ¹	15,615	16,198	16,855	17,395
	Out of State	3,854	3,996	4,379	4,589
	Out of Country	44	36	65	60
	Delinquent/Expired	3,286	3,266	3,287	3,411
	Retired Status <i>if applicable</i>	688	796	935	1,036
	Inactive	348	385	374	391
	Other ²	N/A	N/A	N/A	N/A
Occupational Therapy Assistant	Active	3,851	4,067	4,249	4,372
	Out of State	857	865	888	874
	Out of Country	1	1	1	1
	Delinquent/Expired	1,021	1,067	1,045	1,034
	Retired Status <i>if applicable</i>	147	159	199	226
	Inactive	93	99	101	102
	Other	N/A	N/A	N/A	N/A

Note: 'Out of State' and 'Out of Country' are two mutually exclusive categories. A licensee should not be counted in both.

16. What are the board's performance targets/expectations for its licensing³ program? Is the board meeting those expectations? If not, what is the board doing to improve performance?

CCR section 4112 requires that the Board provide written notice to an applicant whether their application is complete or deficient within 30 days of the Board's receipt of the application. Internal statistics for the last four fiscal years reflect that the Board is meeting the established expectation.

17. Using Table 7a, **Licensing Data by Type**, describe any increase or decrease in the board's average time to process applications, administer exams and/or issue licenses. Have pending applications grown at a rate that exceeds completed applications? If so, what has been done by the board to address them? What are the performance barriers and what improvement plans are in place? What has the board done and what is the board going to do to address any performance issues, i.e., process efficiencies, regulations, BCP, legislation?

The Board is meeting its regulatory goal in processing applications and notifying applicants within 30 days of the status of their application, so pending applications have not grown at a rate that is not manageable. On occasion, when the Board has been in jeopardy of exceeding the 30-day notification period, it has been able to redirect staff resources. The Board will continue to monitor the processing times and take appropriate steps to seek additional staff through the BCP process and/or consider legislative or regulatory change if it is not able to meet the standards established in CCR section 4112.

¹ Active status is defined as able to practice. This includes licensees that are renewed, current, and active.

² Other is defined as a status type that does not allow practice in California, other than retired or inactive.

Table 7a. Licensing Data by Type										
		Received	Approved /Issued	Closed	Pending Applications			Application Process Times		
					Total (Close of FY)	Complete (within Board control)*	Incomplete (outside Board control)*	Complete Apps*	Incomplete Apps*	Total (Close of FY))
FY 2021/22	(License)	2274	1760	393	551	206	345	24	67	1812
	(Renewal)	9927	8904	657	6083					
FY 2022/23	(License)	2267	1871	433	455	181	274	27	72	1926
	(Renewal)	10357	9330	943	6302					
FY 2023/24	(License)	2326	1881	351	481	162	319	26	68	1949
	(Renewal)	10704	9687	986	6278					
FY 2024/25	(License)	2006	1641	334	467	143	324	24	70	1684
	(Renewal)	11797	10276	929	6366					
* Optional. List if tracked by the board.										

Table 7b. License Denial				
	FY 2021/22	FY 2022/23	FY 2023/24	FY 2024/25
License Applications Denied (no hearing requested)	1	4	0	2
SOIs Filed	0	0	0	1
Average Days to File SOI (from request for hearing to SOI filed)	N/A	N/A	N/A	127
SOIs Declined	0	0	0	0
SOIs Withdrawn	0	0	0	0
SOIs Dismissed (license granted)	0	0	0	0
License Issued with Probation / Probationary License Issued	0	0	0	1
Average Days to Complete (from SOI filing to outcome)	N/A	N/A	N/A	137

18. How many licenses or registrations has the board denied over the past four years based on criminal history that is determined to be substantially related to the qualifications, functions, or duties of the profession, pursuant to BPC § 480? Please provide a breakdown of each instance of denial and the acts the board determined were substantially related.

The Board denied a total of five licenses over the past four years based on criminal history.

- FY 2021/22 – Zero applications denied for criminal history.
- FY 2022/23 – Four applications denied for Driving Under the Influence.
- FY 2023/24 – Zero applications denied for criminal history.
- FY 2024-25 - One application denied for Driving Under the Influence.

Two additional applications were denied in FY's 2021/22 and 2024/25 respectively for unethical behavior.

19. How does the board verify information provided by the applicant?

- What process does the board use to check prior criminal history information, prior disciplinary actions, or other unlawful acts of the applicant? Has the board denied any licenses over the last four years based on the applicant's failure to disclose information on the application, including failure to self-disclose criminal history? If so, how many times and for what types of crimes (please be specific)?

When an applicant submits their application for licensure, he or she is required to disclose whether any health-related professional licensing or disciplinary body in any state, territory, or foreign jurisdiction has ever denied, limited, placed on probation, restricted, suspended,

cancelled, or revoked any professional license, certificate, or registration, or imposed a fine, reprimand, or taken any other disciplinary action against any license or certificate they hold or have ever held within the preceding seven years from the date of application. If the applicant discloses another license on their application, he or she is required to submit a license verification from the issuing authority. The license verification is used as a primary source to determine if the applicant had a license or certificate that had been disciplined by another state or province. (This process also allows the Board to determine if the applicant has been truthful in the application process.)

As part of the licensure process, each applicant is required to submit their fingerprints for processing through the California Department of Justice and the Federal Bureau of Investigation for processing at both the State and Federal levels. (This process also allows the Board to determine if the applicant has been truthful in the application process.)

- Does the board fingerprint all applicants?

As part of the licensure process, all applicants are required to submit their fingerprints for processing through the California Department of Justice and the Federal Bureau of Investigation. Applicants can submit their fingerprints electronically if they access one of several hundred Live Scan locations in California. Applicants located out of state must complete and submit fingerprint cards directly to the Board; the Board then forwards the cards to the DOJ for manual processing. Whether fingerprints are submitted via Live Scan or fingerprint cards, no applicant is approved for licensure until the background checks from both the Department of Justice and Federal Bureau of Investigation are received by the Board.

- Have all current licensees been fingerprinted? If not, explain.

All current licensees have been fingerprinted before their initial license applications were approved in order to verify whether an applicant has been convicted of crimes in the past, and to provide the Board with subsequent arrest information. Thus, the fingerprint image is "maintained" by the Department of Justice. With the fingerprints maintained by DOJ, the Board also receives subsequent arrest and subsequent conviction reports. This allows the Board to open a 'case' and monitor the arrest through the process; staff can then determine if the conviction is substantially related to the qualifications, functions, or duties of an occupational therapy practitioner.

- Is there a national databank relating to disciplinary actions? Does the board check the national databank prior to issuing a license? Renewing a license?

The National Practitioner Data Bank (NPDB) collects information and maintains reports on:

- Federal and state licensure and certification actions
- Health care-related criminal convictions and civil judgments
- Medicare and Medicaid exclusions
- Medical malpractice payments
- Adverse clinical privileges actions
- Adverse professional society membership actions
- Other adjudicated actions or decisions

The intent of the databank is to improve the quality of health care by requiring state licensing boards, hospitals, health care employers, other health care entities, and professional societies to report those licensees who engage in illegal or unprofessional behavior; and to restrict the

ability of incompetent health care practitioners from moving from state-to-state without disclosure or discovery of previous discipline, medical malpractice payment or other adverse action. Adverse actions can involve action taken against licensure, clinical privileges, and professional society membership.

Reporters to the NPDB include, but are not limited to:

- State healthcare licensing boards
- Health and Human Services' Office of the Inspector General
- State entity licensing and certification authorities
- Medical malpractice payers
- Hospitals
- Professional societies with formal peer review
- Other health care entities with formal peer review (e.g., HMOs, managed care organizations, etc.)
- Drug Enforcement Agency

Board staff does not check the national databank prior to issuing or renewing a license due to their being an associated cost to this request.

- Does the board require primary source documentation?

The Board requires primary source documentation (e.g., educational transcripts issued by the university or college, verification of passage of the examination issued by the vendor, license verifications issued by another state agency, certified court documents relating to convictions.) to ensure the accuracy of the document submitted. This verification process assists the Board in determining if the applicant has been truthful in the application process, when the documentation submitted is compared to the information the applicant has provided on the application form.

- Does the board send No Longer Interested notifications to DOJ on a regular and ongoing basis? Is this done electronically? Is there a backlog? If so, describe the extent and efforts to address the backlog.

Yes. The CBOT sends No Longer Interested notifications to DOJ electronically. This ongoing, automated process is facilitated by a BreZE interface between DOJ and the PTBC. The CBOT does not have a backlog.

20. Describe the board's legal requirement and process for out-of-state and out-of-country applicants to obtain licensure.

The Board does not have reciprocity with any other state licensing boards. Any person from another state seeking licensure in California as an Occupational Therapist (OT) or Occupational Therapy Assistant (OTA) will need to demonstrate compliance with all licensing requirements, including demonstrating minimum entry-level competence. This is demonstrated by completion of specific educational and supervised fieldwork requirements set forth in BPC section 2570.6 and successful completion of the entry-level examinations administered by NBCOT.

Occupational Therapists trained outside of the United States are required to complete the educational and supervised fieldwork requirements set forth in BPC section 2570.6 and successfully complete the entry-level certification examination administered by NBCOT. (There are no foreign occupational therapy assistant programs recognized; only graduates of United States occupational therapy assistant programs are eligible to take the NBCOT examination.)

Pursuant to BPC section 30, applicants shall provide either an individual taxpayer identification number or a social security number before a license can be issued.

An individual applying for a license as an occupational therapist or as an occupational therapy assistant shall submit a completed application and demonstrate to the Board that he or she meets all the requirements set forth in BPC Section 2570.6:

(a) That the applicant is in good standing and has not committed acts or crimes constituting grounds for denial of a license under Section 480. (b)(1) That the applicant has successfully completed the academic requirements of an educational program for occupational therapists or occupational therapy assistants that is approved by the board and accredited by the American Occupational Therapy Association's Accreditation Council for

Occupational Therapy Education (ACOTE), or accredited or approved by the American Occupational Therapy Association's (AOTA) predecessor organization or approved by AOTA's Career Mobility Program.

(b)(2) The curriculum of an educational program for occupational therapists shall contain the content required by the ACOTE accreditation standards, or as approved by AOTA's predecessor organization, or as approved by AOTA's Career Mobility Program.

(c)(1) For an applicant who is a graduate of an occupational therapy or occupational therapy assistant educational program who is unable to provide evidence of having met the requirements of paragraph (2) of subdivision (b), he or she may demonstrate passage of the examination administered by the National Board for Certification in Occupational Therapy, the American

Occupational Therapy Certification Board, or the American Occupational Therapy Association, as evidence of having successfully satisfied the requirements of paragraph (2) of subdivision (b).

(c)(2) For an applicant who completed AOTA's Career Mobility Program, he or she shall demonstrate participation in the program and passage of the examination administered by the National Board for Certification in Occupational Therapy, the American Occupational Therapy Certification

Board, or the American Occupational Therapy Association, as evidence of having successfully satisfied the requirements of paragraphs (1) and (2) of subdivision (b).

(d) That the applicant has successfully completed a period of supervised fieldwork experience approved by the board and arranged by a recognized educational institution where he or she met the academic requirements of subdivision (b) or (c) or arranged by a nationally recognized professional association. The fieldwork requirements for applicants applying for licensure as an occupational therapist or certification as an occupational therapy assistant shall be consistent with the requirements of the ACOTE accreditation standards, or AOTA's predecessor organization, or AOTA's Career Mobility Program, that were in effect when the applicant completed his or her educational program.

(e) That the applicant has passed an examination as provided in Section 2570.7.

(f) That the applicant, at the time of application, is a person over 18 years of age, is not addicted to alcohol or any controlled substance, and has not committed acts or crimes constituting grounds for denial of licensure under Section 480.

BPC Section 2570.4 allows an occupational therapist or occupational therapy assistant who holds a current, active, and non-restricted license issued by another state with requirements at least as stringent as California to work in California for 60-days from the date an application for licensure is received by the Board; the OT or OTA must work in association with a California-licensed OT. Any applicant who holds or has ever held a license, registration, or certificate in any health-related profession, including occupational therapy, in any state, province, or country, must disclose these licenses, registrations or certificates and request a license verification from each of those jurisdictions.

Other than those items listed above, the application process is the same for new graduates, or applicants from out-of-state or country.

21. Describe the board's process, if any, for considering military education, training, and experience for purposes of licensing or credentialing requirements, including college credit equivalency.

Existing law, BPC section 2570.6, establishes that an applicant for licensure must successfully complete an occupational therapy academic program that has been accredited by the Accreditation Council on Occupational Therapy Education (ACOTE).

Existing law, BPC section 2570.7, also establishes an applicant for state licensure must pass the examination administered by NBCOT. In order for NBCOT to allow a candidate to sit for the certification examination the candidate must provide evidence (a transcript) they successfully completed an OT or OTA educational program that is accredited by ACOTE; graduates of a foreign educational program must submit evidence to NBCOT that the program they completed contained substantially equivalent courses to the education curriculum required of program accredited by ACOTE.

As previously reported, there is a pathway for OTAs to qualify by having completed military education and training. This is because military OTA programs have been accredited by ACOTE and meet NBCOT's eligibility requirements for the COTA examination.

A review of the qualification requirements for occupational therapists serving in the armed services, indicates that completion of an accredited occupational therapy degree program and passage of the NBCOT examination is required.

- How many applicants offered military education, training or experience towards meeting licensing or credentialing requirements, and how many applicants had such education, training or experience accepted by the board?

From July 1, 2021, to June 30, 2025, the Board received one application for licensure as an occupational therapy based on military education, training, and experience. All applicants were approved for licensure.

- How many licensees has the board waived fees or requirements for pursuant to BPC § 114.3, and what has the impact been on board revenues?

The Board has waived fees or requirements for 6 OTs and 1 OTA pursuant to BPC § 114.3. The impact to board revenues has been minimal and absorbable.

- How many applications has the board expedited pursuant to BPC § 115.5?

The Board has expedited 48 OT and 22 OTA applications pursuant to BPC § 115.5.

Examinations

22. Describe the examinations required for licensure. Is a national examination used? Is a California specific examination required? Are examinations offered in a language other than English?

Pursuant to BPC Section 2570.7, each applicant for licensure shall successfully complete the entry level certification examination for occupational therapists or occupational therapy assistants. The national examinations determine whether a candidate for licensure is able to demonstrate entry-level competence as an occupational therapist or occupational therapy assistant. The passage

of the national examinations administered by NBCOT is a minimum licensure requirement for the United States and Puerto Rico.

Currently, a California specific examination is not required. The national examinations are not offered in other languages.

23. What are pass rates for first time vs. retakes in the past 4 fiscal years? Please include pass rates for **all** examinations offered, including examinations offered in a language other than English. *Include a separate data table for each language offered.*

Table 8(b). National Examination.			
License Type		Occupational Therapist	Occupational Therapy Assistant
Exam Title		Occupational Therapist Registered	Certified Occupational Therapy Assistant
FY 2021/22	Number of Candidates	1314	469
	Overall Pass %	76.03%	67.16%
	Overall Fail %	23.97%	32.84%
FY 2022/23	Number of Candidates	1375	520
	Overall Pass %	74.55%	71.92%
	Overall Fail %	25.45%	28.08%
FY 2023/24	Number of Candidates	1585	520
	Overall Pass %	73.06%	67.5%
	Overall Fail %	26.94%	32.5%
FY 2024/25	Number of Candidates	1518	449
	Overall Pass %	62.91%	60.58%
	Overall Fail %	37.09%	39.42%
Date of Last OA		2022	2022
Name of OA Developer		NBCOT	NBCOT
Target OA Date		2027	2027

24. Is the board using computer-based testing? If so, for which tests? Describe how it works. Where is it available? How often are tests administered?

The NBCOT uses computer-based testing to administer the examinations required to demonstrate competence as an occupational therapist or an occupational therapy assistant. The examinations are administered at Prometric Test Centers (PTC) worldwide, through a network of more than 10,000 testing centers in more than 160 countries. Most PTC test centers are open six days a week and many centers offer evening hours for candidate convenience.

Candidates are encouraged to review the Certification Examination Handbook, which is available on NBCOT's website, prior to applying for the exam. The handbook has been developed to provide exam candidates with the information they need to complete an examination application and successfully pass the required examination.

All candidates are required to answer the character questions on the exam application and for those who respond affirmatively, comply with related documentation requirements. Candidates requesting special testing accommodations must indicate this request on the application and comply with associated documentation requirements.

Reporting services are available to all candidates as part of the exam application process including: 1) Confirmation of Examination Registration and Eligibility to Examine Notice; and 2) Official Score Transfer. After the candidate has submitted an exam application and fee to NBCOT, they must also submit an Official Final Transcript or an Academic Credential Verification Form (ACVF). The ACVF may be submitted if the official transcript is not final with the understanding that the final transcript must be submitted when available from the college or university's Registrars' Office.

Once an exam application has been approved by NBCOT, the candidate is provided with an Authorization to Test (ATT) letter. The ATT letter authorizes the candidate to take the examination and is active for 90 days. Upon receipt of an ATT letter, a candidate can then proceed with contacting Prometric Test Centers to schedule a date, time, and location to test. The official score report is provided directly to the Board via an on-line secure portal, once the candidate makes the request to NBCOT.

25. Are there existing statutes that hinder the efficient and effective processing of applications and/or examinations? If so, please describe. Has the Board approved any amendments, or is the Board considering amendments to address the hindrances presented by these statutes?

There are no statutory barriers or inefficiencies that hinder the processing of applications. The application process required in California is consistent across the United States, including completing educational programs accredited by ACOTE and passage of the examinations administered by NBCOT.

26. When did the Board last conduct an occupational analysis that validated the requirement for a California-specific examination? When does the Board plan to revisit this issue? Has the Board identified any reason to update, revise, or eliminate its current California-specific examination?

The Board has not been involved in the development, scoring, analysis, and administration of the examination. However, California-licensed occupational therapists routinely serve, as part of pool of more than 50 licensed professionals and faculty members from across the nation, as subject matter experts (SMEs). The SMEs are responsible for exam question development, review, validation, and revision.

School Approvals

27. Describe legal requirements regarding school approval. Who approves your schools? What role does BPPE have in approving schools? How does the board work with BPPE in the school approval process?

The Accreditation Council for Occupational Therapy Education approves all occupational therapy educational programs; the Board does not work directly with BPPE.

28. How many schools are approved by the board? How often are approved schools reviewed? Can the board remove its approval of a school?

Not applicable; the Board does not approve, review, remove schools.

29. What are the board's legal requirements regarding approval of international schools?

Not applicable; the Board does not approve schools or educational programs.

Continuing Education/Competency Requirements

30. Describe the board's continuing education/competency requirements, if any. Describe any changes made by the board since the last review.

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. One hour of participation in a professional development activity qualifies for one PDU; one academic credit equals 10 PDUs; one Continuing Education Unit (CEU) equals 10 PDUs.

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. Professional development activities acceptable to the board include programs or activities sponsored by the American Occupational Therapy Association 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.

Although not yet finalized, the Board has approved a regulatory package that, once approved by the Department of Consumer Affairs and the Office of Administrative Law, will enact changes that provide clarity to the reporting requirement instructions, implement supervision of a doctoral student as a method by which to earn continuing education credit, require a combined three units of continuing education focused on ethics and diversity, equity, and inclusion, and require one unit on California laws and regulations related to the profession. The package also provides for the addition of language that further promotes the Board's mandate of public protection by requiring new graduates that renew their license for the first time more than one year following the issuance of their initial license to provide twelve hours of continuing education credit earned, whereas none have been required in the past.

Continuing Education			
Type	Frequency of Renewal	Number of CE Hours Required Each Cycle	Percentage of Licensees Audited
All License Types	Biennial	24	10%

- How does the board verify CE or other competency requirements? Has the Board worked with the Department to receive primary source verification of CE completion through the Department's cloud?

On the renewal application, licensees are required to self-certify, under penalty of perjury, that they have completed 24 PDUs as a condition of renewing their license with active status. Certificates of completion are not required to be submitted at the time of renewal.

Due to access limitations the Board did not move forward with using cloud- based access. However, the Board previously reported a requested change in BreZE that would allow the licensee to upload copies of their continuing education certificates at the time of renewal which could be a convenient repository of documentation for the licensee that could also be used by Board staff in the event the licensee's renewal is audited in the future. This feature

became available to the licensees August of 2022. If the licensee chooses to not upload their certificates at the time of renewal but are later audited, the licensee will be given an option to access their BreEZe account to upload copies of the certificates or to mail hard copies.

- Does the board conduct CE audits of licensees? Describe the board's policy on CE audits.

The Board randomly audits renewing licensees to determine compliance with the PDU requirement. The Board has established a goal of conducting audits on 10% of its active renewals.

- What are consequences for failing a CE audit?

A citation and fine is issued to licensees who fails to respond to the Board's letters auditing a renewal or who fail to demonstrate completion of the 24 PDUs required for renewal. The citation includes an Order of Abatement that requires the licensee to complete the deficiency that exists, be it as few as one hour or the full 24 hours.

Licensees that fail to comply with the Order of Abatement are referred to the Office of the Attorney General (AGO) for formal disciplinary action against their license.

- How many CE audits were conducted in the past four fiscal years? How many fails? What is the percentage of CE failure?

The Board conducted 591 CE audits in the past four fiscal years. There were 123 failed audits which equals 21%.

- Who approves CE courses? What is the board's course approval policy?

The Board does not approve continuing education courses or the companies that provide courses. However, CCR section 4161(b) states that activities acceptable to the Board include, but are not limited to, programs or activities sponsored by the American Occupational Therapy Association or the Occupational Therapy Association of California.

The Board also accepts coursework or programs that contribute directly to professional knowledge, skill, and ability and is objectively measurable in terms of the hours involved. Licensees can meet the continuing competency requirement in a variety of ways other than paying a provider and completing courses.

For example, licensees can supervise a student completing the fieldwork required by their educational program; participate in structured special interest or study groups; mentor a practitioner or receive structured mentoring with an individual skilled in a particular area; publish an article in a peer-reviewed or non-peer reviewed publication; publish a chapter in an occupational therapy or related professional textbook; attend a Board meeting or Board outreach activity.

- Who approves CE providers? If the board approves them, what is the board's application review process?

The Board does not approve CE providers or courses.

- How many applications for CE providers and CE courses were received? How many were approved?

Not applicable; no data to report.

- Does the board audit CE providers? If so, describe the board's policy and process.

The Board does not audit continuing education providers.

- Describe the board's effort, if any, to review its CE policy for purpose of moving toward performance-based assessments of the licensee's continuing competence.

Due to the lack of evidence-based research available, the Board is not planning to move forward with performance-based assessments of licensees at this time.

AGENDA ITEM 11

UPDATE ON THE CONTINUING EDUCATION AUDIT PROCESS.

Updates to the Continuing Education Audit Process

Old Process

Pool of licensees to select from determined by expiration date.

- If auditing for July 2024, all licensees with a 7/31/2024 expiration date are eligible for selection.
- This method dilutes the selection pool and requires staff to manually check for and remove licensees that are exempt from audit requirements.

Audit letters for licensees that renewed from delinquent status needed to be manually adjusted by staff to specify the correct audit period (time period of acceptable completion dates of courses/activities).

Follow up letters requesting additional info or for lack of response were crafted individually by staff for each licensee.

Staff resources divided between the logistics of the audit process and reviewing submitted PDUs for accuracy.

If a failed audit was referred to Enforcement, the Enforcement Analyst may have sent additional letters to the licensee to attempt to gather further evidence of PDU completion.

- This was confusing to the licensee being audited and was sometimes inconsistent.

New Process

Pool of licensees to select from determined by date renewal was completed.

- If auditing for July 2024, all licensees that completed a renewal for active status during that month are eligible for selection.
- All licensees in the selection pool are subject to audit requirements, by definition.

The correct audit period dates for licensees renewing from delinquent status are automatically added to the audit letter as part of the batch letter process.

Follow up letters are automated as part of the batch letter process.

Staff are able to focus more on the task of verifying submitted PDUs and ensuring accuracy of the audit.

When a failed audit is referred to Enforcement, a citation is issued immediately.

- Licensees may still appeal the citation, but this will be the final opportunity to provide evidence of completion of the audit requirements.

Next steps for the new process are to develop an FAQ sheet to include with each initial audit letter that addresses some common mistakes and misunderstandings about the audit process. This should help to achieve a higher pass rate and reduce the number of letters and amount of clarification needed for a successful audit.

AGENDA ITEM 12

UPDATE ON THE BOARD'S 2025 – 2030 STRATEGIC PLAN.

INCLUDES THE FOLLOWING:

- 12.1 ACTION PLAN OBJECTIVE SCORECARD
- 12.2 ACTION PLAN DETAILED OBJECTIVE PROGRESS

CBOT Action Plan Objective Scorecard

Goal 1: Licensing 27%

Objective 1.1	0%
Objective 1.2	25%
Objective 1.3	33%
Objective 1.4	50%

Goal 2: Enforcement 17%

Objective 2.1	0%
Objective 2.2	33%

Goal 3: Outreach and Communication 4%

Objective 3.1	0%
Objective 3.2	17%
Objective 3.3	0%
Objective 3.4	0%

Goal 4: Laws and Regulations 13%

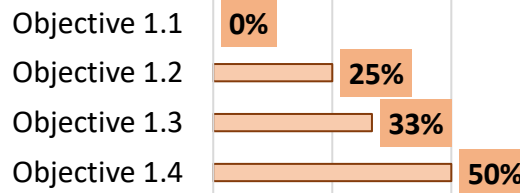
Objective 4.1	25%
Objective 4.2	0%

Goal 5: Organization and Administration Effectiveness 3%

Objective 5.1	0%
Objective 5.2	0%
Objective 5.3	17%
Objective 5.4	0%
Objective 5.5	0%

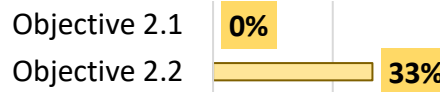
Goal 1: Licensing

0% 25% 50% 75% 100%



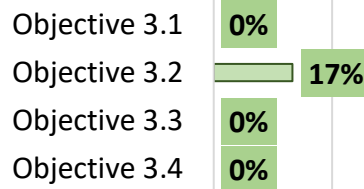
Goal 2: Enforcement

0% 25% 50% 75% 100%



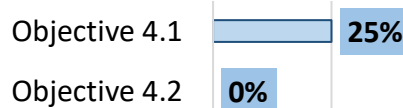
Goal 3: Outreach and Communication

0% 25% 50% 75% 100%



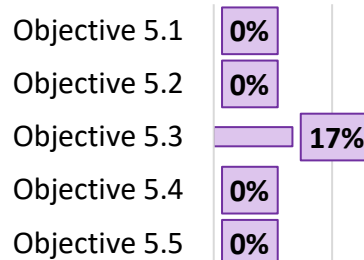
Goal 4: Laws and Regulations

0% 25% 50% 75% 100%



Goal 5: Organization and Administration Effectiveness

0% 25% 50% 75% 100%



CBOT Action Plan Detailed Objective Progress

2025-2030 Action Plan		Responsibility	Due Date	Current Status
Goal 1: Licensing				
1.1	Review communication processes to identify efficiencies and other improvements.			0%
Success Measure:	Roadblocks identified, website updated, and automation implemented.		Q2 2028	
1.1.1	Direct people to Board website. (Set expectations.)	Social Media Coordinator, All Staff	Q1 2025 and ongoing	In Progress
1.1.2	Identify communication roadblocks.	Licensing Manager	Q1 2026 and ongoing	In Progress
1.1.3	Update website with licensing processing time expectations.	BreEZe Liaison	Q2 2026	Not Started
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	Not Started
1.1.5	Automate some communication (implementing BreEZe communications, etc.).	BreEZe Liaison	Q2 2028	Not Started
1.2	Improve communication with applicants and licensees regarding the licensure process, requirements, and processing times.			25%
Success Measure:	Decreased time for deficiency resolution.		Q1 2028	
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	In Progress
1.2.2	Review and update License Requirement Checklist, make it more visible.	Licensing Manager	Q4 2025	Not Started
1.2.3	Implement in-box for resolving delinquencies. Train licensing technicians.	BreEZe Liaison	Q3 2026	Completed
1.2.4	Develop a BreEZe how-to guide for licensees and for staff (show what consumer sees).	BreEZe Liaison	Q1 2028	In Progress
1.3	Review licensing fees to balance fiscal responsibilities and reduce barriers to licensure.			33%
Success Measure:	Regulations package submitted, statutory language voted on.		Q1 2028	

1.3.1	Conduct fee analysis for regulatory increases in fees.	Executive Officer	Q2 2025	Completed
1.3.2	Budget office presents to Board. Board votes on regulatory language.	Executive Officer	Q2 2025	Completed
1.3.3	Regulations package submitted.	Regulations Analyst	Q3 2025	In Progress
1.3.4	Continue fee analysis for statutory change in fees.	Executive Officer	Q3 2026	Not Started
1.3.5	Board votes on statutory language.	Executive Officer	Q1 2027	Not Started
1.3.6	Put forth a bill.	Executive Officer	Q1 2028	Not Started
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.			50%
1.4.1	Board discussion on exam versus a continuing education (CE) requirement.	Executive Officer	Q1 2025	Completed
1.4.2	Work with Regulations Attorney for language on CE requirement.	Regulations Analyst, Executive Officer	Q3 2025	Completed
1.4.3	Board votes to implement CE requirement.	Executive Officer	Q3 2025	Completed
1.4.4	Work with professional associations to develop a CE course.	Licensing Manager	Q3 2026	Not Started
1.4.5	Submit regulations package.	Regulations Analyst	Q4 2026	In Progress
1.4.6	Inform licensees of CE requirement.	BreEZe Liaison, All Staff	Q1 2027 and ongoing	In Progress
Goal 2: Enforcement				
2.1	Evaluate and update the subject matter expert (SME) program to improve recruitment, training, retention, and diversity.			
Success Measure:	Increased number of SMEs.			0%
2.1.1	Develop an insert for advanced practice approval letters informing licensees about SME opportunity.	Enforcement Manager, Advanced Practice	Q4 2025	Delayed
2.1.2	Explore offering CE credits to SMEs.	Enforcement Manager, Executive Officer	Q3 2026	Not Started
2.1.3	Create a SME training.	Enforcement Manager	Q3 2026	Not Started

2.1.4	Review compensation structure. (To make sure they're competitive as possible.)	Enforcement Manager, Executive Officer	Q3 2026	Not Started
2.1.5	Message on social media and work with professional associations as well.	Enforcement Manager, Social Media	Q1 2027	In Progress
2.1.6	Create/update recruitment video.	Enforcement Manager, Social Media	Q1 2027	Not Started
2.2	Research enforcement options in addition to cite and fine and formal discipline.			
Success Measure:	More disciplinary options available and costs decreased.			33%
2.2.1	Research/explore public reproval.	Lead Enforcement	Q1 2026	In Progress
2.2.2	Research/explore letter of reprimand.	Lead Enforcement	Q1 2026	In Progress
2.2.3	Explore a cite and fine for Driving Under the Influence (DUIs).	Enforcement Manager	Q1 2026	Completed
2.2.4	Research what other options Healing Boards/District Attorney General Liaison use/suggest.	Enforcement Manager, Executive Officer	Q3 2027	Completed
2.2.5	Research alternatives to Failure to Cooperate, e.g., put hold on renewal, create new disposition. (with known incorrect addresses.)	Enforcement Manager, Executive Officer	Q2 2028	Not Started
2.2.6	Explore adding BreEZe codes or dispositions. (e.g., separating abatements, etc.)	Enforcement Manager, Executive Officer	Q2 2028	In Progress
Goal 3: Outreach and Communication				
3.1	Explore having the ability to capture additional licensee contact information to communicate quickly and effectively.			
Success Measure:	Increased collection of emails.			0%
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	In Progress
3.1.2	Add an optional email field to applications. (research - needs Board vote?)	BreEZe Liaison	Q2 2028	Not Started
3.1.3	Update BreEZe to capture or require this information.	BreEZe Liaison	Q2 2028	Not Started

3.2	Expand outreach presentations to increase stakeholder engagement and involvement.			
Success Measure:	Increased attendance at meetings and more presentations given.			17%
			Q3 2027	
3.2.1	Update presentation.	Executive Officer	Q3 2025	Completed
3.2.2	Give presentation at Occupational Therapy Association of CA (OTAC) conference and other professional conferences.	Enforcement Manager	Q4 2025 and ongoing	In Progress
3.2.3	Explore topics for town hall meetings (and presentations).	Enforcement Manager	Q2 2026	In Progress
3.2.4	Give remote presentations (schools, etc.).	Enforcement Manager	Q3 2026 and ongoing	Not Started
3.2.5	Host CBOT townhalls (virtual, advertise on social media; targeted topics).	Enforcement Manager, Licensing Manager, Executive Officer	Q4 2026	Not Started
3.2.6	Explore offering CE credits for attending town halls. (regulations change.)	Executive Officer, Regulations Analyst	Q3 2027	Not Started
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.			0%
			Q4 2027	
3.3.1	Begin diverse postings about professional topics, tips for licensure, etc.	Social Media Coordinator	Q3 2026	Not Started
3.3.2	Explore additional platforms.	Social Media	Q3 2026	In Progress
3.3.3	Work with other DCA programs to see how they use social media (e.g., Facebook).	Social Media Coordinator	Q4 2027	Not Started
3.3.4	Research administration of Facebook page.	Social Media	Q4 2027	Not Started
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.			0%
			Q3 2026	
3.4.1	Include above information during outreach presentations and social media. (see objective 3.3)	Executive Officer	Q2 2025 and ongoing	In Progress
3.4.2	Add mission of Board to website.	BreEze Liaison	Q3 2025	Not Started
3.4.3	Add information about consumer protection to Frequently Asked Questions on website.	BreEze Liaison	Q3 2025	Not Started
3.4.4	Collaborate with professional associations to help convey advocacy is not CBOT's role.	Executive Officer	Q3 2026 and ongoing	In Progress

Goal 4: Laws and Regulations				
4.1	Increase communication about new, or changes to, laws and regulations to keep licensees informed and compliant.			25%
Success Measure:	Website updated, process for completed packages written. Q1 2027			
4.1.1	Discuss disseminating complete package announcements to licensees. (cost effective, is email ok?)	Executive Officer, Regulations Analyst	Q3 2025	In Progress
4.1.2	Use continuing education classes.	Licensing Manager	Q3 2026 and ongoing	In Progress
4.1.3	Review and update list of pending packages on website.	Regulations Analyst	Q1 2027	In Progress
4.1.4	Collaborate with legal counsel on minimum posting requirements for pending packages.	Regulations Analyst	Q1 2027	Completed
4.2	Review and update regulations as necessary to ensure they are relevant and effective.			0%
Success Measure:	Regulations reviewed and process map created. Q1 2027			
4.2.1	Collaborate with legal counsel to review all pending packages and define reason for any delays.	Executive Officer, Licensing Manager	Q1 2025 and ongoing	In Progress
4.2.2	Collaborate with legal counsel to review current regulations, looking for any needed updates.	Executive Officer, Licensing Manager	Q1 2025 and ongoing	In Progress
4.2.3	Create process maps for Board-specific regulations update processes.	Licensing Manager	Q1 2027	Not Started
Goal 5: Organization and Administration Effectiveness				
5.1	Develop relationships between management and staff to promote a safe, diverse, and equitable workplace.			0%
Success Measure:	Increased trainings, collaborative projects, and Employee Satisfaction and Engagement action plan created. Q3 2026			
5.1.1	Have Diversity, Equity, and Inclusion trainings and workgroups. (Work with SOLID Training)	Executive Officer	Q1 2025 and ongoing	In Progress
5.1.2	Have more collaborative projects with staff (between units and individuals).	Enforcement Manager, Licensing Manager	Q1 2025 and ongoing	In Progress
5.1.3	Increase staff appreciation/social events.	Enforcement Manager, Licensing Manager, Executive Officer	Q4 2025 and ongoing	In Progress

5.1.4	Explore doing a management ride along/job shadow to increase understanding of staff workload/environment.	Enforcement Manager, Licensing Manager, Executive Officer	Q2 2026 and ongoing	In Progress
5.1.5	Participate in Employee Satisfaction and Engagement Assessment and Action Plan (with SOLID Planning).	Executive Officer	Q3 2026	Not Started
5.2	Increase staff training to provide the resources necessary for increasing effectiveness and efficiency.			
Success Measure:	Staff taking more classes, procedures completed.		Q4 2030	
5.2.1	Have staff develop and present their own trainings.	Licensing Manager, Enforcement Manager	Q2 2025 and ongoing	In Progress
5.2.2	Use LMS for more than just for required training.	Licensing Manager, Enforcement Manager	Q3 2025 and ongoing	In Progress
5.2.3	Explore customized trainings from SOLID Training. (e.g., Finding Time - Improving Your Time Management Skills, Exceptional Customer Service.)	Licensing Manager, Enforcement Manager	Q4 2026	Not Started
5.2.4	Develop refined procedures and make them accessible.	Executive Officer	Q4 2030 and ongoing	In Progress
5.3	Review and refine board processes and procedures to improve efficiencies and effectiveness.			17%
Success Measure:	G drive cleaned, Adobe licenses distributed, and SharePoint implemented.		Q4 2030	
5.3.1	Explore cloud storage possibility.	Executive Officer	Q2 2025	
5.3.2	Research Adobe licenses.	Enforcement Manager	Q3 2025	In Progress
5.3.3	Hold staff meetings to gather staff input for improvements.	Executive Officer, Licensing Manager, Enforcement Manager	Q4 2025 and ongoing	In Progress
5.3.4	Develop a plan for keeping procedures up to date.	Executive Officer, Licensing Manager, Enforcement Manager	Q4 2026	Not Started
5.3.5	Create an intranet for CBOT/SharePoint site that hosts resources for staff.	Executive Officer	Q4 2030	In Progress
5.3.6	Clean up/reorganize the G Drive.	Executive Officer, Licensing Manager, Enforcement Manager	Q4 2030	In Progress

5.4		Explore and implement the most effective methods for delivering board meeting agendas and materials.			0%
Success Measure:		Materials delivered to board members in a timelier manner according to board president input.		Q3 2026	
5.4.1	Review and share with board president the DCA timeline for providing board materials.	Executive Officer	Q4 2025	Not Started	
5.4.2	Work with the board president earlier to finalize meeting agendas.	Executive Officer	Q3 2026	In Progress	
5.4.3	Explore implementing electronic meeting agenda and packets.	Executive Officer	Q3 2026	In Progress	
5.4.4	Research other board practices.	Executive Officer	Q3 2026	In Progress	
5.5		Promote awareness of board member vacancies to foster a diverse candidate pool.			0%
Success Measure:		Social media posts live, web page updated, dialogue established with appointing authorities.		Q3 2025	
5.5.1	Announce vacancies on social media.	Social Media	Q2 2025	In Progress	
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	In Progress	
5.5.3	Review web page and see if any updates would be helpful regarding filling board member vacancies.	Licensing Manager	Q2 2025	In Progress	
5.5.4	Reach out to board member appointing authorities (stress CBOT is at quorum).	Executive Officer	Q3 2025	In Progress	