



President's Report & Annual Business Meeting 2023

Cindy Blackwell, OTD, OTR/L

TNOTA President



Conference 2023

Agenda

- Call to Order
- Elections
- Membership Report
- Treasury Report
- District Reports
- Committee Reports
- Exhibitor Bingo Drawing
- Next Steps
- 2024 Save the Date
- Member Feedback & Questions



TNOTA Vision & Mission

Vision:

TNOTA is the primary resource, authority, and public voice for the profession of Occupational Therapy in the state of Tennessee.

Mission:

TNOTA strives to advance Occupational Therapy in Tennessee through education, advocacy, communication, and legislative involvement to support the provision of high quality occupational therapy services and promote the benefits of our profession to consumers, stakeholders, and legislators in Tennessee.

TNOTA Vision & Mission

Mission: To fulfill this mission, TNOTA seeks to:

- Provide professional support to our members and advance the profession through communication, education, and advocacy
- Understand and represent member interests and concerns
- Improve the quality of occupational therapy services in TN
- Enhance consumer health and wellbeing through promotion of best practices in occupational therapy in Tennessee
- Represent occupational therapy to the public and promote the benefits of our profession to consumers, stakeholders, and legislators in Tennessee

TNOTA Core Values

- We commit to serve and support our profession by bringing knowledge, creativity, and diversity to the field of occupational therapy
- We strive for excellence in our work and accountability to our members
- We collaborate, advocate, and steward our resources to protect our profession for future generations

Board Members: Elected Positions

| Board Position (Elected) | |
|----------------------------------|----------------------------------|
| President | Cindy Blackwell, OTD, OTR/L |
| Vice President, Conference Chair | Valery Hanks, OTR/L, C/NDT, CPAM |
| Secretary | Anye Soumis, MS, OTR/L |
| Treasurer | Kelsey Vaughn, OTD, OTR/L |

Board Members: Who We Are

Board Position

| | |
|-------------------------------|---|
| West District Co-Chairs | Anne Zachry, PhD, OTR/L Cameron Volker, OTS Claire Herring, OTS |
| Rural West District Co-Chairs | Barbara Meussner, MBA, OTR/L Kaylie Garner, OTR/L |
| Middle District Chair | Morgan Booth, OTR/L |
| East District Chair | Julia Adams, CSRS, OTD, OTR/L |
| Northeast District Chair | Kimberly Jessee, OTR/L |
| Southeast District Co-Chairs | Bhumika Patel, OTR/L Martin Davis, OTR/L, CSRS |

Board Members: TNOTA President-Elect

Introducing Dr. Stephanie Lancaster, EdD, OTR/L, ATP, CDP
TNOTA President-Elect



Upcoming Elections

- TNOTA Secretary
 - Nominations are open October 15-November 15
 - Voting runs November 16-December 15

Submit your nomination at

tnota.org/nomination2023

Membership Report

9/1/2022 - 8/31/2023

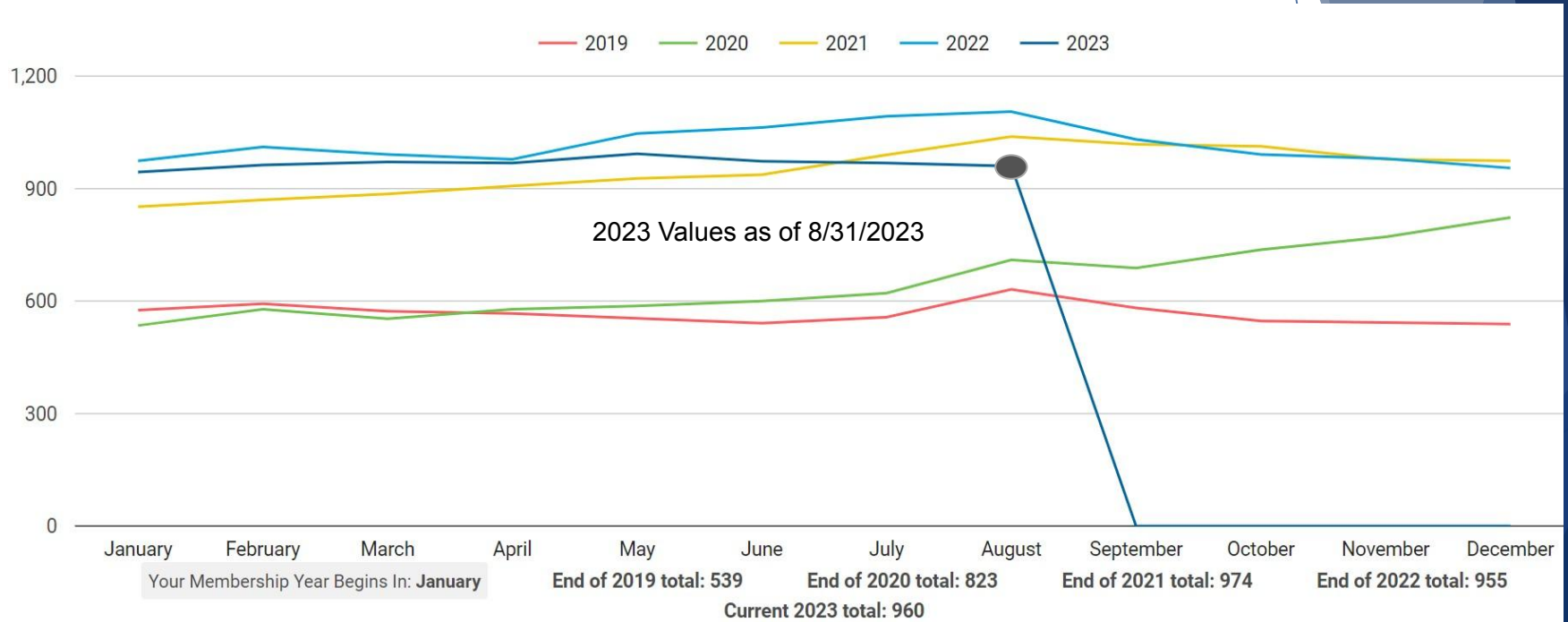
Cindy Poole, OTD, OTR/L
Membership Chair
membership@tnota.org



TNOTA Membership Report

| | 9/1/2021 - 8/31/2022 | 9/1/2022 - 8/31/2023 |
|--------------|----------------------|----------------------|
| 1st Yr. OT: | 40 | 38 (-2) |
| OT: | 366 | 359 (-7) |
| 1st Yr. OTA: | 22 | 11 (-11) |
| OTA: | 104 | 83 (-21) |
| Retired: | 2 | 3 (+1) |
| Student: | 385 | 382 (-3) |
| Total: | 919 | 876 (- 47) |

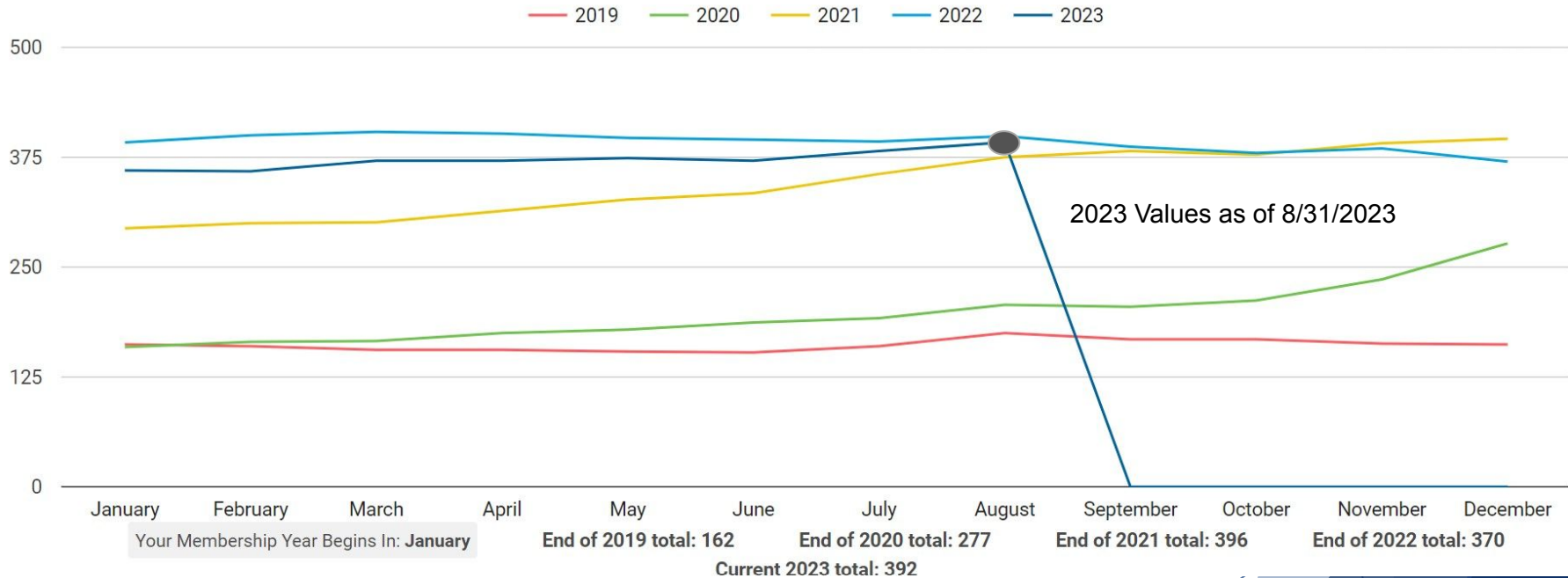
5-Year Total Membership Trend



Overall consistent maintenance of membership numbers after largest gain in 2021

Largest represented groups are OTs and students

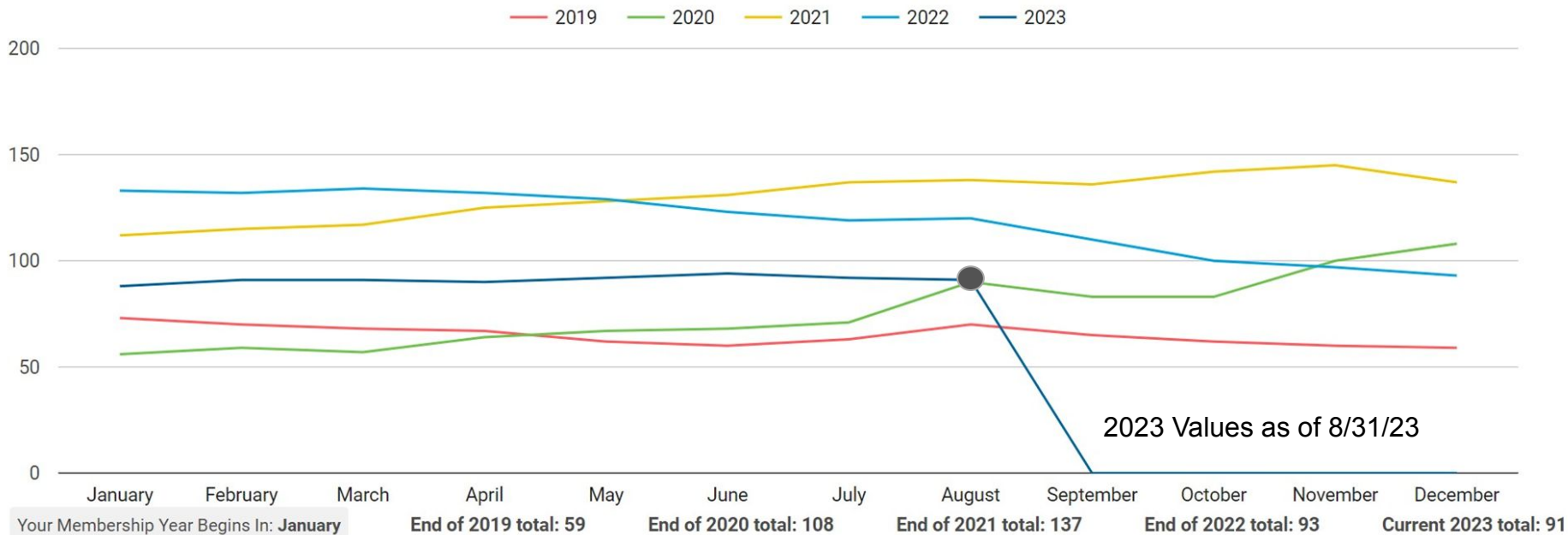
OT Membership 5 Year Trend



Consistent Yearly Membership Numbers
after largest gains in 2020 - 2021

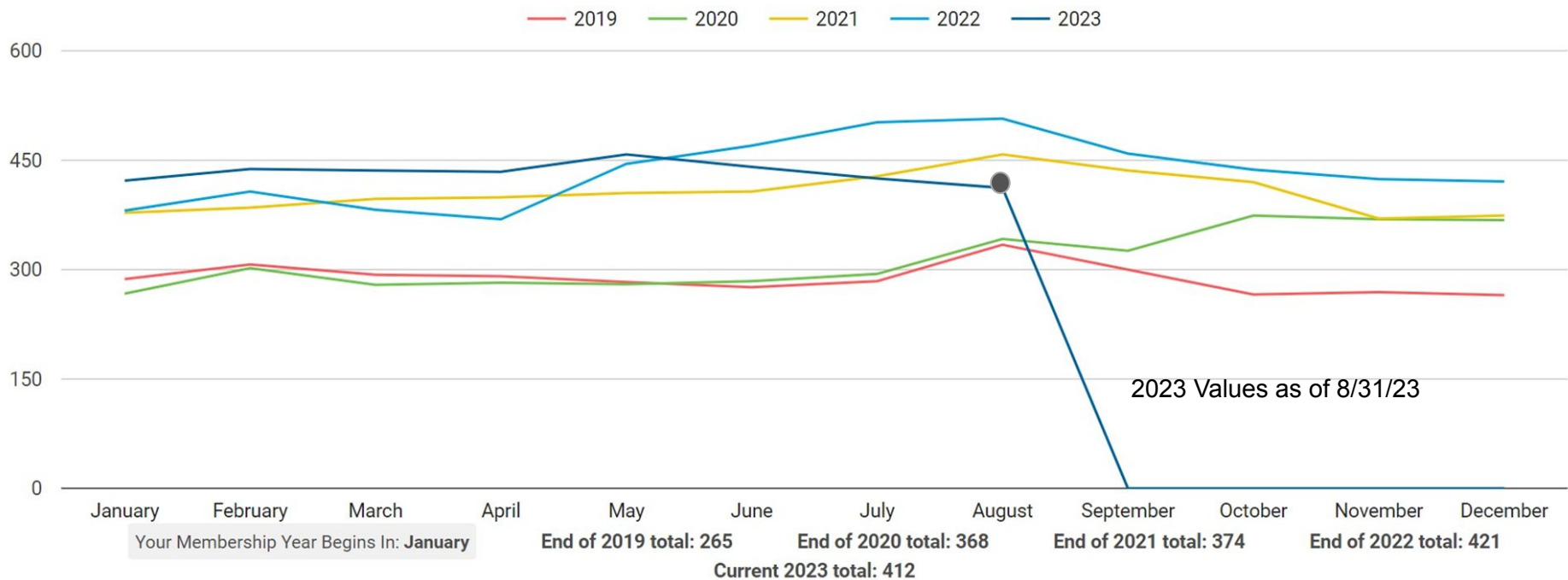


OTA Membership 5-Year Trend



OTA Member numbers have been on a steady decline since 2021
Reduction of over 40 members in the last 3 years.

Student Membership 5-Year Trend



Students remain the largest group of TNOTA members

Value of TNOTA Membership & Benefits

| OT Membership \$80 & OTA \$60 | Savings |
|--|---------------|
| Conference Registration \$400 → \$325 | \$ 75 |
| Required Ethics & Jurisprudence \$40 → Free! | \$ 40 |
| Suicide Prevention \$40 → Free! | \$ 40 |
| Continuing Education opportunities @ only \$ 40 each | Endless Value |
| Advocacy to protect our professional interests/ funding/ license | Priceless |
| New practitioner mentor | Priceless |



You reap the benefit of your membership with only the 2 required courses for licensure renewal, even if you do not take advantage of every other benefit!

Treasury Report

Kelsey Vaughn, OTD, OTR/L
TNOTA Treasurer



MADE BY FREE-VECTORS.NET

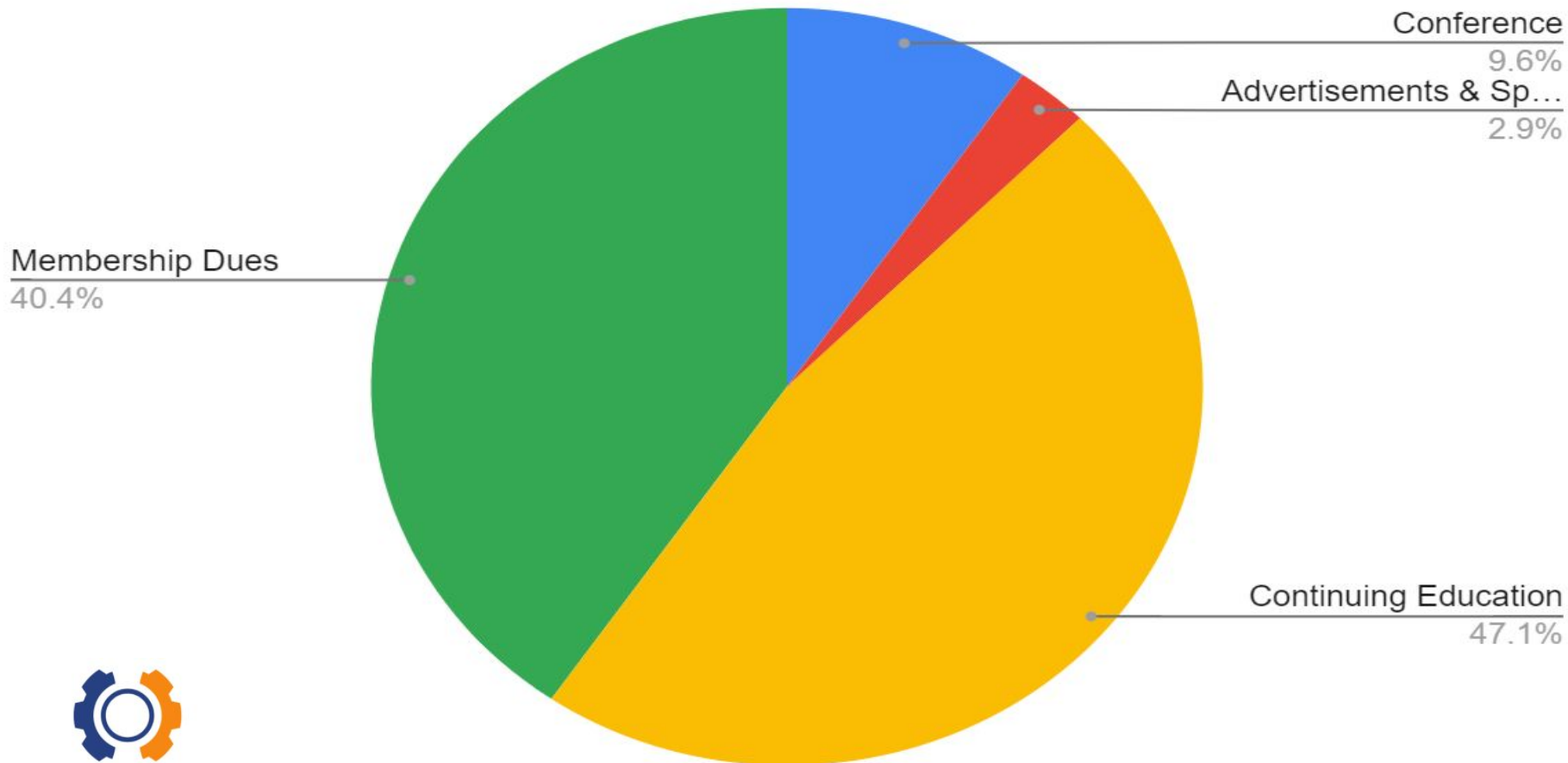
Account Snapshot

| | YTD 2023 | 2022 |
|--|-----------------|--------------|
| Pinnacle Checking Account | \$152,190.67 | \$111,362.31 |
| Money Marketing Account | \$39,990.18 | \$39,930.41 |
| Total Assets | \$192,180.85 | \$151,292.72 |

Year To Date Revenue

| | |
|--|-------------|
| Conference | \$7,125.00 |
| Advertisements & Sponsorships | \$2,125.00 |
| Continuing Education | \$35,026.59 |
| Membership Dues | \$30,030.00 |

Year To Date Revenue



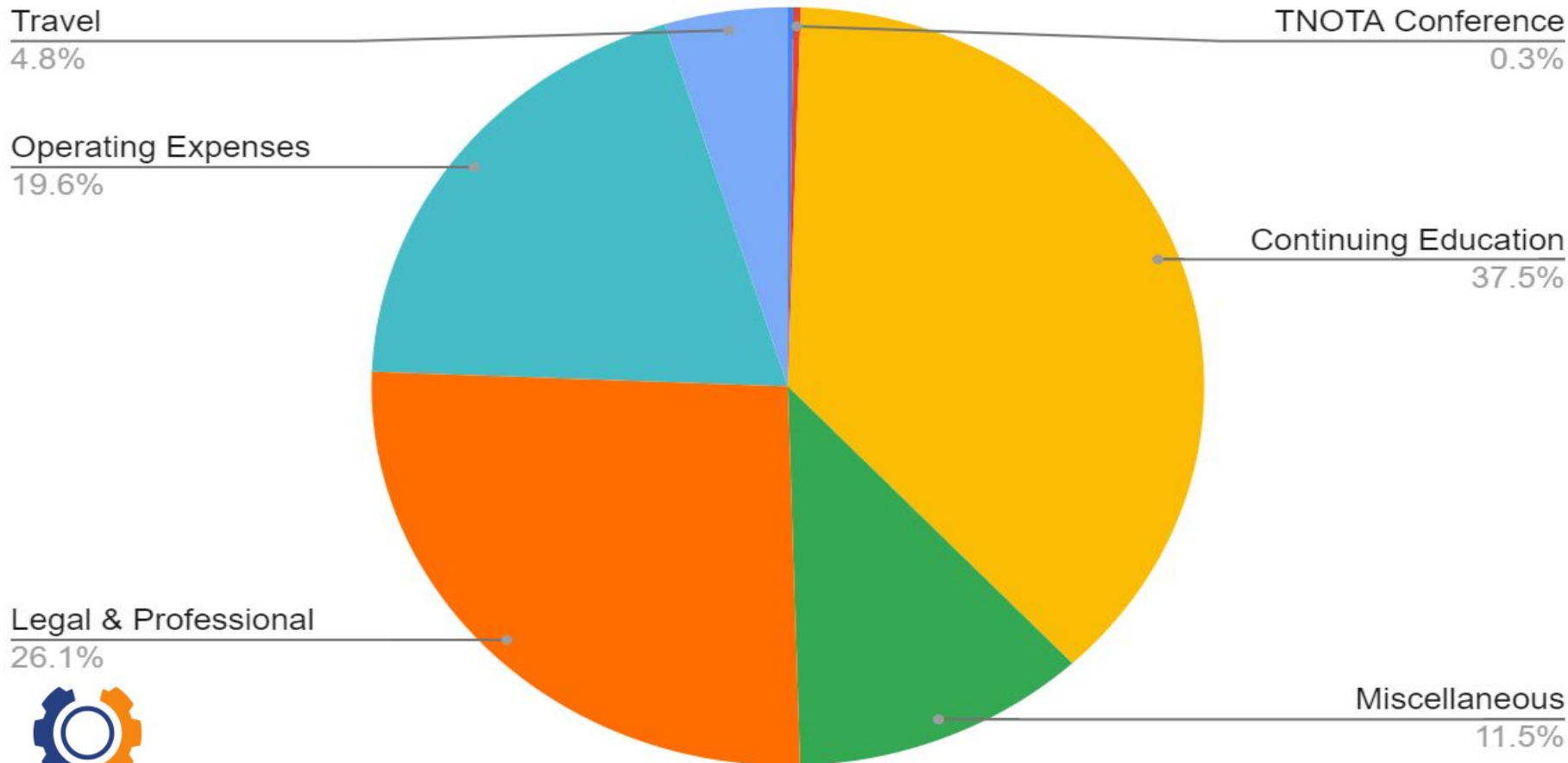
Year To Date Expenses

| | YTD 2023 | Budgeted | Variance |
|--------------------------------------|-----------------|-----------------|-----------------|
| Board Meetings | \$86.51 | \$800.00 | \$713.49 |
| TNOTA Conference | \$108.16 | \$32,700.00 | \$32,591.84 |
| Continuing Education | \$14,605.00 | \$19,230.00 | \$4,625.00 |
| Misc (CC fees, Insurance) | \$4,476.00 | \$5,200.00 | \$724.00 |
| Legal and Professional | \$10,150.80 | \$17,350.00 | \$7,199.20 |

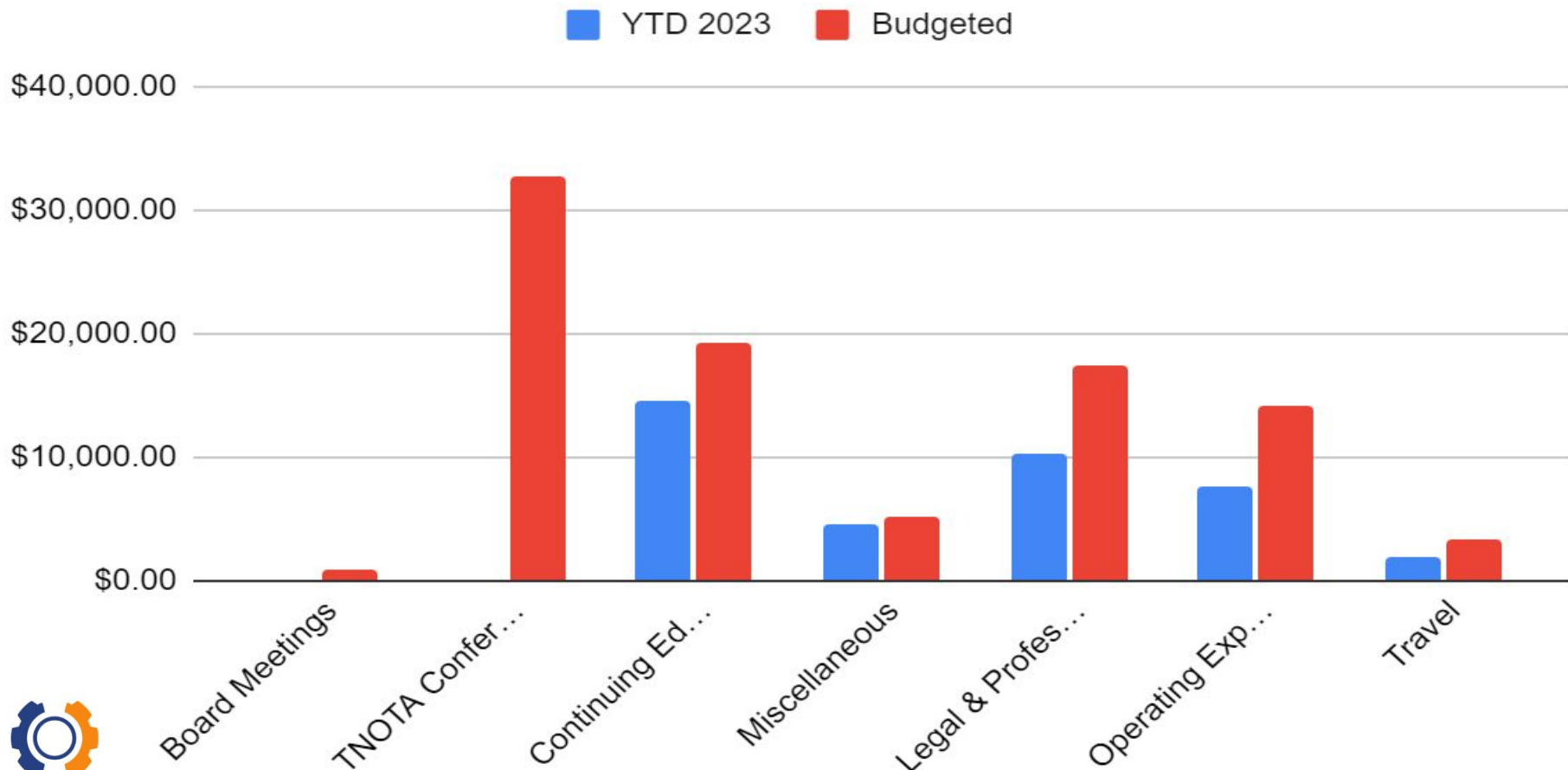
Year To Date Expenses

| | YTD 2023 | Budgeted | Variance |
|---------------------------|-----------------|-----------------|-----------------|
| Operating Expenses | \$7,627.55 | \$14,070.00 | \$6,442.45 |
| Travel | \$1,860.94 | \$3,275.00 | \$1,414.06 |

Year To Date 2023 Expenses



Year To Date Expenses



August Financial Report

Income

- \$13,701.53

Expenses

- \$5,969.95

Highest Income

- Conference Registrations

Highest Expense

- Continuing Education Expenses (i.e., presenter expense)



August Financial Report

Net Income

- \$7,731.58

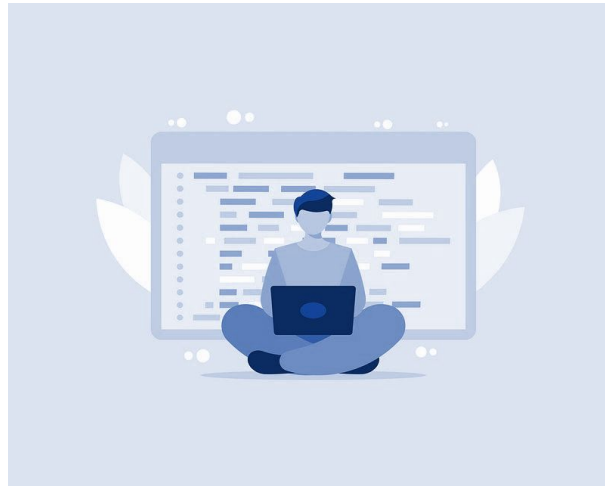
Year To Date Net Income

- \$35,689.82



Continuing Education Committee: Year in Review

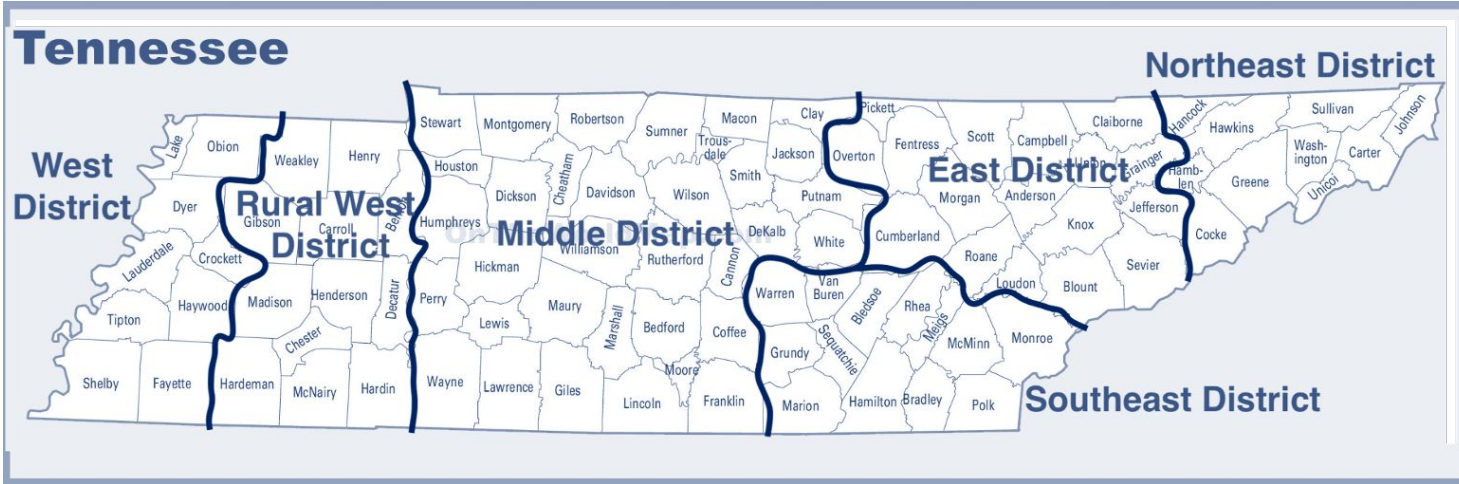
Audrey Owens, OTD, OTR/L
Continuing Education Chair
continuinged@tnota.org



Continuing Education Committee

- Committee Members
 - Audrey Owens (Chair)
 - Gabe Borman
 - Tanner Wright
- Approved Provider Program
 - Program to review continuing education courses for approval with TNOTA
 - Committee members review course, and if approved, it can be advertised as Approved by TNOTA
 - 1-2 courses approved per month (10 in 2023 so far)
 - Once approved, approval lasts for 1 year and is listed on the TNOTA website

TNOTA District Reports



TNOTA West District

Anne Zachry, PhD, OTR/L, Claire Herring, OTS, Cameron Volker, OTS

TNOTA West District Co-Chairs

4 CE events this year:

- November 2022: Ethics & Jurisprudence
 - 59 Certificates Earned
- February 2023: Caution/Improve: Educational Acronyms
 - 31 Certificates Earned
- May 2023: Occupational Therapy and Lactation
 - 27 Certificates Earned
- August 2023: OT Sex Talk: Clinician Practices for Inclusive, Sex-Positive Communication about Sexual Health between the Client and the OT Practitioner
 - 24 Certificates Earned



TNOTA Rural West District

Barbara Meussner, MBA, OTR/L & Kaylie Wehner Garner, OTR/L
TNOTA Rural West Co-Chairs

- CEU Events this year
 - Compliance Day - E & J / Suicide Prevention
 - Held annually in November
 - The Mental Health Toolkit (Kaylin and Dakota Lawrence)
 - A full day workshop heavily attended
 - When Pharmacology meets OT
 - Collaboration with Union Univ professor
 - 2024 goals:
 - Increase communication with local OT/COTA colleagues
- Provide three local live CEU events

TNOTA Middle District

Morgan Booth, OTR/L

TNOTA Middle District Chair

- Recently filled vacant/inactive Middle District Chair position
 - Morgan moved from Vice Chair to Chair!
- 2024 goals:
 - Recruit vice chair & secretary
 - Revive district participation

TNOTA East District

Julia Adams, CSRS, OTD, OTR/L

TNOTA East District Chair

2023 Year in Review

- Fostered relationship with East TN PT groups
- Continued partnership with APTA TN Upper Cumberland district
- March- Course created with East TN PT to be hosted by Methodist Medical Center: “Demystifying Edema”*

*(cancelled for non-participation)

2024 Goals

- Fill co-chair and secretary positions
- 1 QPR or E&J course, 1 topical course, 1 social event
- Foster relationship with OT and OTA programs in East TN

TNOTA Northeast District

Kimberly Jessee, OTR/L & Jennifer Crowder, DSc, OTR

TNOTA Northeast District Co-Chairs

Hosted 2 Courses:

- **OT Compliance Day** hosted with ETSU OTD- included QPR & E&J
- **OT Practitioner & Advocacy CEU/District Meeting** hosted with Milligan University
- Fall Pediatric Course Postponed until Spring 2024, per presenter's request

2024 Goals:

- Confirm 2024 CEUs by January Board Meeting
- Develop strong relationships with students/faculty of local OT/OTA programs and local OTs to improve TNOTA involvement for the NE District.

TNOTA Southeast District

Martin Davis, OTR/L, CSRS & Bhumika Patel, OTD, OTR/K

TNOTA Southeast District Co-Chairs

Year in review:

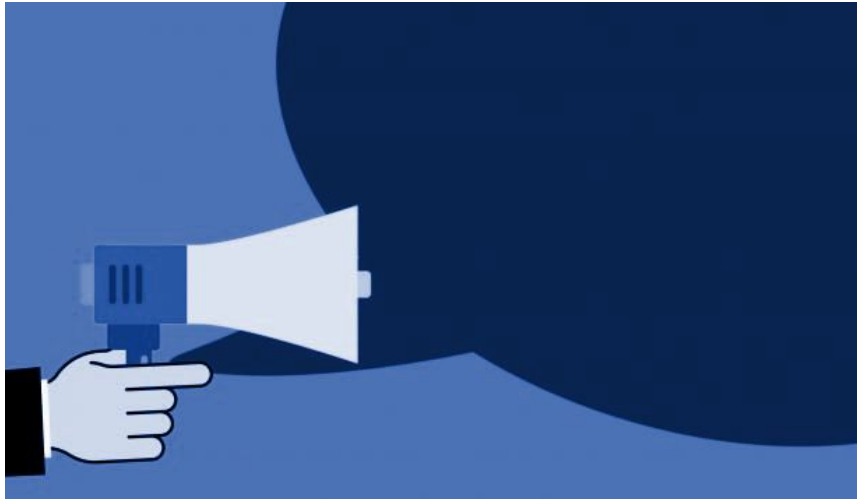
- September 2022: The Forgotten Aspects of Stroke Recovery and How to Treat Them
 - 41 Certificates Earned
- 2023 April: District Meet-up
 - Location: Oddstory Brewing Company
- Continuing to connect with UTC TNOTA representative to bridge gap between school and professional world of OT

2024 Goals:

- Continuing building connections with UTC students and district members to increase involvement in TNOTA CEU, events, and programming

TNOTA Communications: Marketing

Morgan Webb, MOT, OTR/L
Marketing Chair
marketing@tnota.org



2023 Marketing Accomplishments

- New design temple for the Monthly Newsletter
- Monthly email Newsletters sections include an Advocacy section and updated Membership Corner
- TNOTA website updated regularly
- New web pages and updated Quick Links
- New & updated forms to streamline Executive Board Member processes
- Multiple new advertisers

OTA Connect

Ashley Robertson, COTA/L
OTA Connect Chair
OTAconnect@tnota.org



OTA Connect

OTA Connect is a volunteer committee that provides a supportive and collaborative connection point for current and future COTA/Ls. Topics discussed will include regulations & guidelines for supervision, developing and improving the OTR/L and COTA/L relationship, treatment regulations & best practices, and advancement & advocacy within the field for Occupational Therapy Assistants.

OTA Connect

Upcoming initiatives:

- Educational Series- 10 things an experienced COTA/L wants a new OTR/L to know
- Quarterly meetings (via Zoom)
- In-person networking opportunities

Looking for additional members!

TNOTA Student Involvement Committee

Jennifer Henderson, OTD, OTR/L, BCP
Student Involvement Committee Chair
students@tnota.org



Student Involvement Committee

Mission: OT practitioners and OT/OTA students who work together to advocate for, support, and facilitate the success of students through a variety of initiatives, programs, & presentations designed specifically to assist in the growth of OT practitioners

Student Involvement Committee

Accomplishments:

- all student volunteer positions filled for conference
- new chair and student members

Opportunities:

- involvement opportunities in Marketing, Social Media, & Student Involvement Committee

Goals:

- increase membership in OT/OTA programs
- survey for student chat topics

TNOTA Mentorship Committee

Logan Herndon, OTD, OTR/L

Blaine Coffey, OTR/L

Mentorship Committee Co-Chairs

mentorship@tnota.org



Mentorship Program

5 Committee Members: All OTs

4th Cycle: Feb. 1st - Sept. 30th, 2023

- Started with 9 pairings; ended with 7 pairings
- Added topics and question banks to the “List of Suggested Topics”
- Added an optional Project component
- Updated FAQs on the TNOTA website

2023 Mentorship Program Goals

- Completed a meet & greet (February 1, 2023)
- Offered a CEU seminar on Mentorship through Aspire OT (June 2023)
- Update/expand advertising to increase participation for the 5th Cycle
- Utilize/implement at least 1 project from the Fourth Cycle Project Component
- Continue to update the Program as needed based on feedback from participants (email, surveys, etc.)



Occupational Therapy Mentorship Program

**For more information regarding
the program requirements,
timeline, benefits, and FAQs,
scan the QR code!**



Mentorship Resources Page



www.tnota.org/mentorship-resources



TNOTF & Scholarships

Amanda Newbern, MS, OTR/L
Admin@tnotf.org



TNOTF Scholarships

- Stewarded the McGuire OT2 Scholarship which awarded \$1,000 to TSU's Ryan Lemp, a student pursuing Occupational Therapy as a second profession.
- Awarded \$850 to South College's Taylor Webb, a second year OTA student.
- Purchase TNOTF pins and bags to fund 2024 scholarships!

TNOTA/TNOTF Philanthropy

Each year, TNOTA supports a partner organization through financial support and volunteer service.

Recent philanthropy partners:

- Gigi's Playhouse
- TSU Tiger Rehab Clinic
- Rachel Kay Stevens Therapy Center
- Special Olympics TN

In 2023, TNOTA's Pediatric CoP worked to develop an OT screening tool for use at Special Olympics community events.

TNOTA/TNOTF Philanthropy

It is time to choose the philanthropy organization for 2024!

We invite all TNOTA members to nominate a worthy organization at

tnota.org/philanthropy2023

Nominations will be open through November 15, 2023.

The philanthropy committee is also seeking volunteers to help coordinate our service efforts

TNOTA Mental Health Committee

Megan Colletti, MS, OTR/L

Kaylin Flamm, OTR/L

Mental Health Co-Chairs



Mental Health

Mental health workshops and trainings were presented in West, Middle, and East Districts:

- The Mental Health OT Toolkit: Functional Interventions for Every Setting
- QPR (Question, Persuade, and Refer) Gatekeeper Training for Suicide Prevention

TNOTA Diversity & Inclusion Committee

Whitney Joy Sanford, OTR/L
John Pruet, COTA/L
diversity@tnota.org



TNOTA Diversity & Inclusion Committee

- John D. Pruettt and Whitney Joy Sanford transitioned into DEI co-chair position
- DEI needs assessment was sent to TNOTA members to determine what initiatives are needed to facilitate growth within the organization in this area
- Panel discussion planned surrounding the topic of Affirmative Action and How it Will Affect the Field of Occupational Therapy 10-25-2023 via Zoom
- Plans to develop a mentorship program for high school students of color to pursue a career in occupational therapy

TNOTA Communities of Practice

Established CoPs:

- Mental health
- Pediatrics
- Hand therapy

Newly forming CoPs:

- Pelvic Health
- Business/practice owners

TNOTA Advocacy Committee

Elise Foust, COTA/L
Rosemary Lewis, OTR/L, CBIS, CTP
Advocacy Committee Co-Chairs
advocacy@tnota.org



Advocacy Committee: Legislative Review

2023 legislative session: January 10- April 21

- Capitol & 5th tracked 58 bills on behalf of TNOTA.
- Licensing rules, prior authorization, and women's health were primary topics in healthcare this year.

Advocacy Committee: Legislative Review

Two bills passed that restrict barriers and streamline the process for occupational therapy licenses:

1.SB458/HB496: Senator Bo Watson, Representative Brock Martin: Directs health related boards to promulgate rules that expedite the application process for occupational licenses by requiring the boards to make a determination on applications within 60 days of the date they are submitted. This bill passed both chambers and awaits the Governor's signature.

2.SB296/HB779: Senator Todd Gardenhire, Representative Esther Helton-Haynes: Directs the board of medical examiners, board of osteopathic examination, board of nursing, or board of physician assistants to render a decision on completed applications from a licensed out-of-state applicant and inform the applicant of need to appear before the board, within 60 days of receipt of the application. The House and Senate passed this bill, and it awaits signatures from each speaker.

2023-24 Advocacy Goals

- Continuing to look for a community-based OTP to join our committee.
- Developed and distributed a brief survey on advocacy issues. We plan to use the data from this to develop goals for the rest of the year.
- Please use the QR code to take the survey now if you haven't already.

Advocacy Survey

Please use the QR code to take our advocacy survey!
Tell us what is important to you!

TNOTA Advocacy Member Survey
2023



State Legislative Update

Prepared by:

Courtney Atnip, *Founder*

Capitol & 5th Public Strategies



State Legislative Update

- The 113th TN General Assembly adjourned April 21, 2023.
- On behalf of TNOTA, Capitol & 5th Tracked **58 bills**
- For the 2023 session, TNOTA carried 2 bills on behalf of TNOTA, which passed and were enacted as public chapters.

Licensure decisions on applications

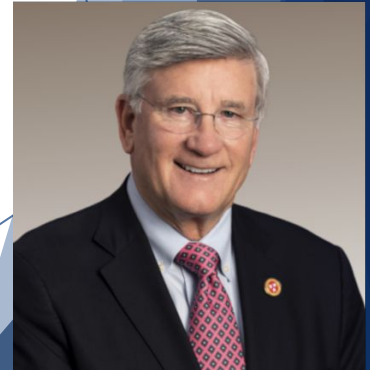
- SB296/HB779, Enacted Public Chapter 443
- Requires the boards of: medical examiners, osteopathic medicine, nursing, physician assistants, physical therapists, occupational therapists, speech language therapists, applied behavior analysts, social workers, drug abuse counselors to render a decision within 45 days of completion of licensure application to the applicant.
- The boards need to either issue the license or inform the applicant why the board denied the license and ask the applicant to appear before the board.

Bill Sponsors:

Senator Todd Gardenhire

Representative Esther

Helton-Haynes



OT Rules & Regulations Revisions

- **Victory!** The TN OT licensure board officially adopted a set of proposed changes to modernize our Rules & Regulations - changes TNOTA has been working on for almost 5 years!
- Key Changes:
 - Added Dry Needling rules & certification application process- effective as of **March 19, 2023**
 - Modernized language, including defining telehealth & adding in provisions for OTD experiential component & capstone

OT Rules & Regulations Revisions

- Defining virtual synchronous vs. asynchronous CEU opportunities & credits
- Additional approved providers including Tennessee Suicide Prevention Network, SAMSHA
 - Also added in language that AOTA & TNOTA approved courses are approved by the board
- Board voted to increase licensure renewal fee, but exact fee has not been decided

The new rules are not in effect yet, as they still have to go through the official government approval channels—coming soon!

Federal Legislation Update: Issues Being Followed by AOTA's Federal Affairs Department

Susan S. McDonald, EdD, OTR/L

TNOTA Legislative Chair



2023-2024 Regular Session 118th - Medicare

H.R. 2474: Strengthening Medicare for Patients and Providers Act |
2023-2024 Regular Session (118th)

H.R. 4315: Medicare Orthotics and Prosthetics Patient-Centered
Care Act | 2023-2024 Regular Session (118th)

2023-2024 118th Regular Session - Mental Health

S. 1592: Occupational Therapy Mental Health Parity Act

| 2023-2024 Regular Session (118th)

2023-2024 118th Regular Session

Workforce Development

[H.R. 744: Supporting the Mental Health of Educators and Staff Act of 2023](#) |

[H.R. 1310: The SHARE Act](#) |

[H.R. 4878: The EMPOWER Act \(Enabling More of the Physical and Occupational Workforce to Engage in Rehabilitation\)](#) |

[HR 4933: Mental Health Professionals Workforce Shortage Loan Repayment Act of 2023](#) |

[S. 462: Mental Health Professionals Workforce Shortage Loan Repayment Act of 2023](#) |

[S. 2459: The EMPOWER Act \(Enabling More of the Physical and Occupational Workforce to Engage in Rehabilitation\)](#)

2023-2024 118th Regular Session - Telehealth

H.R. 3875: Expanded Telehealth Access Act |
2023-2024 Regular Session (118th)

H.R. 4189: CONNECT for Health Act of 2023 |
2023-2024 Regular Session (118th)

S. 2016: CONNECT for Health Act of 2023 |
2023-2024 Regular Session (118th)

Write a letter to your Legislator

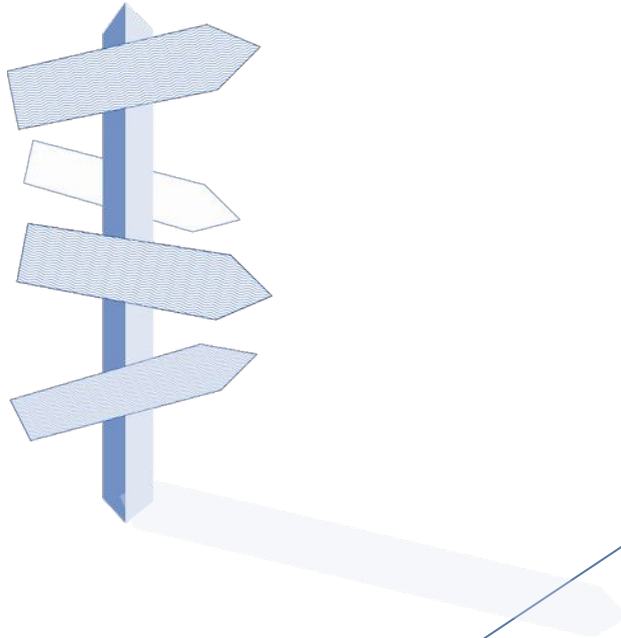
AOTA's Grassroots Advocacy Learning Intensive
Week long advocacy event October 16 -20, 2023

Register here:

<https://www.votervoice.net/AOTA/Events/7480/Register>

Exhibitor Bingo Drawing!

What's next for TNOTA?



Save the Date: Conference 2024!

September 13-15, 2024

Nashville, TN

Scarritt Bennett Center



AOTA State Collaborative Pilot



TNOTA was accepted to be part of a small group of state OT associations as part of a pilot program supported by AOTA

AOTA State Collaborative Pilot

Goals: Collaboratively work together with support from AOTA to optimize shared resources and systems in order to:

- deliver a more robust and consistent value proposition to our members;
- grow both our State Association and AOTA membership;
- increase the depth of our volunteer pool and improve the volunteer leadership experience;
- more effectively move our collective mission to assure the quality of occupational therapy services, improve consumer access to health care services, and promote the professional development of members in our respective states.

AOTA State Collaborative Pilot

Key Strategies:

Stage One - Retain an Association Management Company (AMC) to provide a common set of management functions to a collaborative of State Associations.

Stage Two - Membership Development - Cross promote AOTA and State Affiliate membership in pilot states.

AOTA State Collaborative Pilot

Timeline:

Program Developed 2022- 2023

TNOTA Applied July 2023

TNOTA Accepted October 2023

TNOTA works with other collaborative states Fall 2023

Pilot Launches early 2024



Member feedback and questions

- What can TNOTA do to better serve its members?
- What actions or deliverables would you like to see?
- What questions do you have for TNOTA leadership?

president@tnota.org

Adjournment of Annual Business Meeting