

ANNUAL REPORT
Occupational
Therapy Compact
Commission (OTCC)



2022 – 2023

TABLE OF CONTENTS

TABLE OF CONTENTS	2
OTCC COMMISSIONERS	3
INTRODUCTION	4
ABOUT THE OTCC	5
MAP OF OT COMPACT MEMBER STATES	6
ABOUT COMPACTS	7
OT COMPACT TIMELINE	9
OTCC COMMITTEE REPORTS	10
Executive Committee	10
Public Relations (PR) Committee	12
Finance Committee	13
Rules Committee.....	14
ADMINISTRATIVE RULE PROCESS	15
OTCC COMMITTEE MEETING DATES	16
OTCC ORGANIZATIONAL STRUCTURE	16
FINANCIAL SUMMARY	17
STATUS OF THE OT COMPACT	17
Revenue/Expenditures	18
Other Information	18
Data System	18
OT COMPACT COMMISSION BUDGET: 2022-2023	19
OT COMPACT COMMISSION FINANCIAL REPORT	19

OTCC COMMISSIONERS

Listed in the order in which their states enacted the OT Compact Legislation

2021	2022	2023
Chuck Wilmarth Ex Officio: AOTA	10. Teri Black Wisconsin	23. Juli Carlson Arkansas
Shaun Conway Ex Officio: NBCOT	11. Vonda Malnikoff West Virginia	24. Megan Johnke South Dakota
1. Michael Sobowale Virginia	12. Ann Cosby Alabama	25. Felicia Wang Mississippi
2. Missy Anthony Ohio	13. Nicole Harris Wyoming	26. TBD Indiana
3. Daniel Martin Maryland	14. Jana Johansen Utah	27. TBD Montana
4. Adrienne Price Georgia	15. Kathy Weed Washington	28. Vincent Culotta Louisiana
5. Danielle Ward North Carolina	16. Christopher Daly Arizona	
6. Vanessa Beauchamp Missouri	17. Renee C. Upton Kentucky	
7. Jessica Bolduc Maine	18. Claire C. ByBee Nebraska	
8. Nate Brown Colorado	19. Noranda French Tennessee	
9. Bethany Cottrell New Hampshire	20. Lesly James South Carolina	
	21. Venus V. Walsh Iowa	
	22. Karen Rohrer Delaware	

*Current as of September 30, 2023

INTRODUCTION

On behalf of the Occupational Therapy Compact Commission (OTCC or the Commission), I am pleased to present the first annual OTCC report spanning the time frame from the initial OTCC meeting in 2022 through the annual meeting in October 2023. This report highlights the OTCC's growth and activities; provides relevant information from meetings; details the development process for bylaws, rulemaking, and policies; and provides background related to forming and seating the OTCC. A current organizational chart, a state delegate roster, and a roster of staff and counsel are included in this report.

All delegate volunteers have worked continuously during this time to ensure a successful launch of the Occupational Therapy (OT) Compact. The OTCC Executive Committee and Committee Chairs have worked tirelessly in concert with the Executive Director and Legal Counsel, ensuring that the best information and options are made available for the full commission of delegates and stakeholders. It has been demanding and complex work, but rewarding, nonetheless!

I would like to thank the following entities for their invaluable provisions made for laying the foundation and their ongoing efforts to support for the OT Compact: American Occupational Therapy Association (AOTA); National Board for Certification in Occupational Therapy (NBCOT); The Council of State Governments (CSG).

Respectfully,

Dr. Lesly Wilson James

Lesly Wilson James, PhD, MPA, PMP, OTR/L, FAOTA, FNAP
Chair, Occupational Therapy Compact Commission



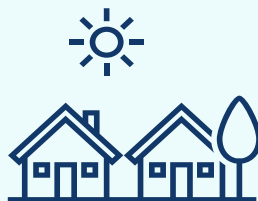
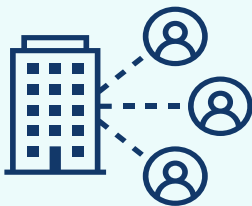
ABOUT THE OTCC

(Occupational Therapy Compact Commission)



The Occupational Therapy Compact Commission (OTCC) facilitates the interstate privileges to practice of occupational therapists and occupational therapy assistants. Public protection is the ultimate goal of the OTCC. It provides a mechanism that allows for legal, ethical, and regulated interstate practice.

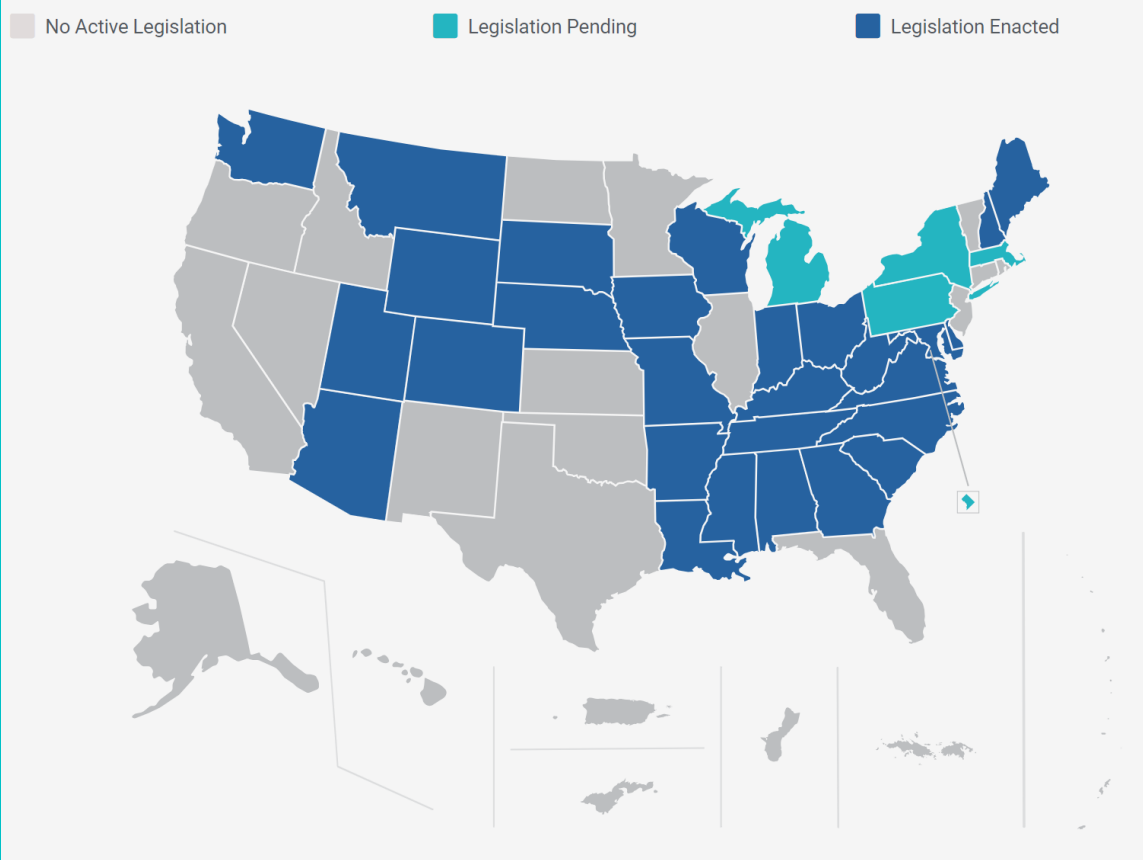
- Member states grant occupational therapists and occupational therapy assistants the privilege to practice.
- Increases access to safe, effective healthcare in underserved communities.
- Provides a means for military families to relocate with no interruption to their profession.



MAP OF OT COMPACT MEMBER STATES

[Click here](#) to view the most current map.

MAP CURRENT AS OF OCTOBER 2023



ABOUT COMPACTS

The past several years has seen astounding interest in occupational interstate compacts. Interstate compacts are contracts between states, which establish formal agreements between states that have been enacted via the legislative process. Compacts have been recognized for years to be durable policy solutions. The most well-known compact is the Driver's License Compact but there are various others that have been used to assist in many other professional, practical, occupational, and operational areas. Each state has enacted at least one compact, and most have enacted an average of twenty-five compacts.

Additionally, there has been continued growth in the number of interstate occupational compacts being offered by professions. The OTCC appreciates CSG's National Center for Interstate Compacts for the following information.

As of October 2023, there are multiple professional licensure interstate compacts in development, including:

- Dietetics
- School Psychology

Several other professions have prepared occupational interstate compact legislation that is ready to be introduced at the state-level, but have not reached the threshold for operation:

- Advanced Practice Registered Nursing
- Cosmetology
- Dentistry and Dental Hygiene
- Massage Therapy
- Physicians Assistants
- Teaching

The number of active occupational licensure compacts continues to grow. The following compacts have reached required threshold numbers of participating jurisdictions needed to become active, although some are not yet fully implemented at this time:

- Audiology and Speech-Language Pathology Interstate Compact
- Counseling Compact
- Emergency Medical Services Compact
- Interstate Medical Licensure Compact
- Nurse Licensure Compact
- Occupational Therapy Compact
- Physical Therapy Compact
- Psychology Interjurisdictional Compact

STATE MEMBERSHIP IN INTERSTATE LICENSURE COMPACTS



National Center for Interstate Compacts
THE COUNCIL OF STATE GOVERNMENTS

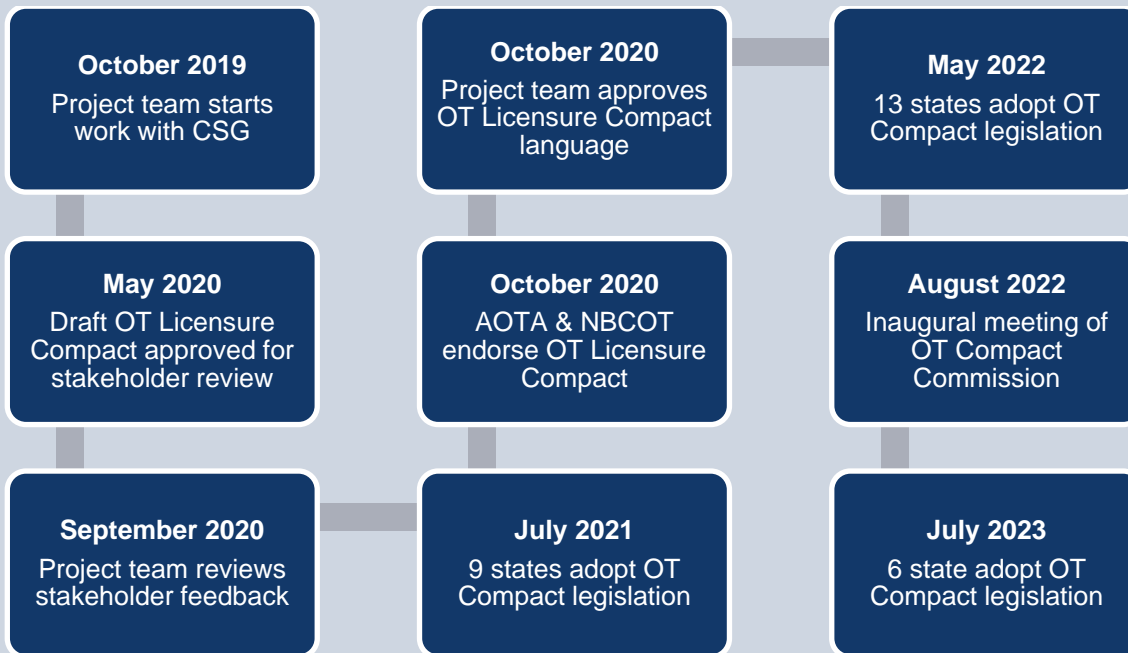
Interstate Licensure Compacts

STATE	APRN	ASLP	COSMETOLOGY	COUNSELING	DENTISTRY	EMS	IMLC	MESSAGE	NLC	OT	PA	PSYPACT	PT	SOCIAL WORK	TEACHING	TOTALS
ALABAMA		*	*	*		*	*		*	*		*	*		*	10
ALASKA																0
AMERICAN SAMOA																0
ARIZONA			*			*		*	*		*	*				6
ARKANSAS	*		*					*	*		*	*				6
CALIFORNIA																0
COLORADO	*		*		*	*		*	*		*	*		*		9
CONNECTICUT			*			*		*	*		*	*				4
DELAWARE	*	*	*		*	*		*	*	*	*	*				10
DISTRICT OF COLUMBIA						*					*	*				3
FLORIDA			*					*			*	*		*		4
GEORGIA	*		*		*	*		*	*		*	*				8
GUAM						*		*								2
HAWAII						*										1
IDAHO	*				*	*		*			*					5
ILLINOIS						*					*					2
INDIANA	*		*		*	*		*	*		*	*				8
IOWA	*		*	*	*	*		*	*		*	*				8
KANSAS	*		*	*	*	*		*	*		*	*		*		8
KENTUCKY	*	*	*		*	*		*	*		*	*		*		9
LOUISIANA	*		*		*	*		*	*		*	*				7
MAINE	*		*		*	*		*	*		*	*				7
MARYLAND	*		*		*	*		*	*		*	*				7
MASSACHUSETTS																0
MICHIGAN						*					*					2
MINNESOTA						*					*					2
MISSISSIPPI	*		*		*	*		*	*			*				7
MISSOURI	*		*		*	*		*	*		*	*	*			9
MONTANA	*		*		*	*		*	*		*	*				6
NEBRASKA	*		*		*	*		*	*		*	*		*		9
NEVADA					*	*	*				*	*		*		5
NEW HAMPSHIRE	*		*			*		*	*		*	*				7
NEW JERSEY						*		*	*		*	*				4
NEW MEXICO								*								1
NEW YORK																0
NORTH CAROLINA		*	*					*	*		*	*				6
NORTH DAKOTA	*		*		*	*		*	*		*	*				7
N. MARIANA ISLANDS											*	*				1
OHIO	*		*			*		*	*		*	*				7
OKLAHOMA	*		*		*	*		*	*		*	*		*		8
OREGON												*		*		2
PENNSYLVANIA					*	*		*	*		*	*				5
PUERTO RICO																0
RHODE ISLAND						*		*			*					3
SOUTH CAROLINA	*				*	*		*	*		*	*				6
SOUTH DAKOTA					*	*		*	*		*	*				5
TENNESSEE	*		*	*	*	*		*	*		*	*				9
TEXAS					*	*		*	*		*	*				5
UTAH	*	*	*		*	*		*	*	*	*	*		*		11
VERMONT	*		*			*		*	*		*	*				6
VIRGIN ISLANDS								*								1
VIRGINIA	*		*		*			*	*		*	*				7
WASHINGTON	*		*	*	*	*		*	*		*	*				8
WEST VIRGINIA	*		*		*	*		*	*		*	*				8
WISCONSIN					*	*		*	*		*	*				5
WYOMING	*		*		*	*		*	*		*	*				7
	3	29	3	30	3	24	41	1	41	28	2	40	37	1	10	293

Information current as of 9/20/2023

*Chart source = Council of State Governments (CSG)

OT COMPACT TIMELINE



28 States have enacted legislation as of October 2023

July 2021	May 2022	July 2023
1. Virginia	10. Wisconsin	23. Arkansas
2. Ohio	11. West Virginia	24. South Dakota
3. Maryland	12. Alabama	25. Mississippi
4. Georgia	13. Wyoming	26. Indiana
5. North Carolina	14. Utah	27. Montana
6. Missouri	15. Washington	28. Louisiana
7. Maine	16. Arizona	
8. Colorado	17. Kentucky	
9. New Hampshire	18. Nebraska	
	19. Tennessee	
	20. South Carolina	
	21. Iowa	
	22. Delaware	

OTCC COMMITTEE REPORTS

EXECUTIVE COMMITTEE

Member Name	Position	State	Term Expires
Lesly James	Chair	SC	2024
Teri Black	Vice Chair	WI	
Danielle Ward	Treasurer	NC	
Renee Causey-Upton	Secretary	KY	
Missy Anthony	Member-at-large	OH	
Vanessa Beauchamp	Member-at-large	MO	
Daniel Martin	Member-at-large	MD	
Chuck Willmarth	Ex-officio delegate	AOTA	
Shaun Conway	Ex-officio delegate	NBCOT	

9 members
4 officers

2 professional
organizations

14 meetings
2022-2023

Purpose of the Executive Committee: The OTCC Executive Committee is empowered to act on behalf of the OTCC between Commission meetings, except for rule making or amendments of the compact. The power of the Executive Committee to act on behalf of the Commission shall be subject to the Bylaws, Rules, and provision of the Compact. The Executive Committee ensures that OT Compact administrative services are appropriately contracted for and provided.

EXECUTIVE COMMITTEE RECOMMENDATIONS TO COMMISSION

- Changes to Rules and/or Bylaws
- Changes to Compact Legislation
- Annual fees to states and/or licensees
- OT Compact Budget in consultation with Finance Committee

EXECUTIVE COMMITTEE ACCOMPLISHMENTS: 2022-2023



28 states enacted legislation



Secured Executive Director, Secretariat, & Legal Counsel



Established Budgets for FY23 & FY24



Operationalized OTCC Bylaws & Rules

EXECUTIVE COMMITTEE NEXT STEPS: 2023-2024

Refine OTCC Rules, Policies, & FAQs

Procure, develop, test, & implement data system

Monitor & refine OTCC Budget

Ongoing communication and meeting facilitation

PUBLIC RELATIONS (PR) COMMITTEE

Name	Position	State	Term Expires
Chris Daly	Chair	AZ	2024
Olivia Freeman	Member	NH	
Lesly James	Member	SC	
Kathryn Loukas	Member	ME	
Kathy Weed	Member	WA	
Missy Anthony	Member	OH	

6 members
1 officer

6 meetings

1 website
4 updates

Purpose of the Public Relations Committee: The OTCC PR Committee is empowered to administer all general communication needs of the OT Licensure Compact and the OTCC. The PR Committee extends outreach to commissioners, administrators, media, and the public via regular updates on the OTCompact website. Additionally, the PR Committee onboards new states to the OT Compact and meets with newly delegated commissioners and appointed alternates.

PUBLIC REALTIONS COMMITTEE ACCOMPLISHMENTS: 2022-2023



Press releases & regular updates



Website updates, toolkit, FAQs



Conference presence & presentations



Engagement with OT practitioners, membership outreach

PUBLIC REALTIONS COMMITTEE NEXT STEPS: 2023-2024

Develop video presentations



Maintain cadence of website updates



Identify speaking engagements



Establish cadence of Eblast updates

FINANCE COMMITTEE

Name	Position	State	Term Expires
Danielle Ward	Chair	NC	2024
Missy Anthony	Member	OH	
Vonda Malnikoff	Member	WV	

3 members
1 officer

8 meetings

1 budget

Purpose of the Finance Committee: The OTCC Finance Committee provides fiscal oversight and ensures that the OTCC operates within its budget. The Finance Committee assists the OTCC in developing and managing financial resources to achieve its purposes.

FINANCE COMMITTEE ACCOMPLISHMENTS: 2022-2023



FINANCE COMMITTEE NEXT STEPS: 2023-2024



RULES COMMITTEE

Name	Position	State	Term Expires
Michael Sobowale	Chair	VA	2024
Nate Brown	Member	CO	
Teri Black	Member	WI	
Ann Cosby	Member	AL	
Claire Covert-Bybee	Member	NE	
Adrienne Price	Member	GA	
Vanessa Beauchamp	Member	MO	


7 members
1 officer

11 meetings

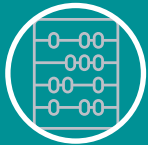
1 Bylaw
1 Rule on Rulemaking

Purpose of the Rules Committee: The OTCC Rules Committee develops uniform Compact rules and bylaw amendments and policies for consideration by the Executive Committee and the Commission. The Rules Committee encourages concurrent implementation of state legislation. The Rules Committee regularly reviews existing rules and recommends necessary changes to the Executive Committee and Commission for consideration.


RULES COMMITTEE ACCOMPLISHMENTS: 2022-2023




Complete 1st tier rules and definitions



Recommend Uniform Data Set Reporting Requirements

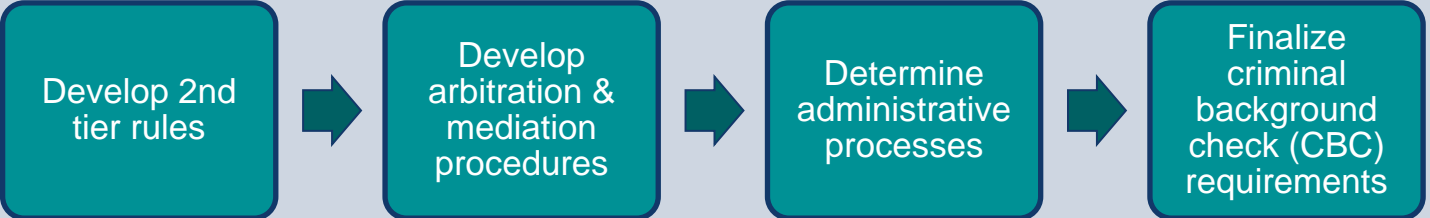


Develop emergency rules and meeting procedures



Make data driven decisions using state survey outreach and results' analysis

RULES COMMITTEE NEXT STEPS: 2023-2024



ADMINISTRATIVE RULE PROCESS



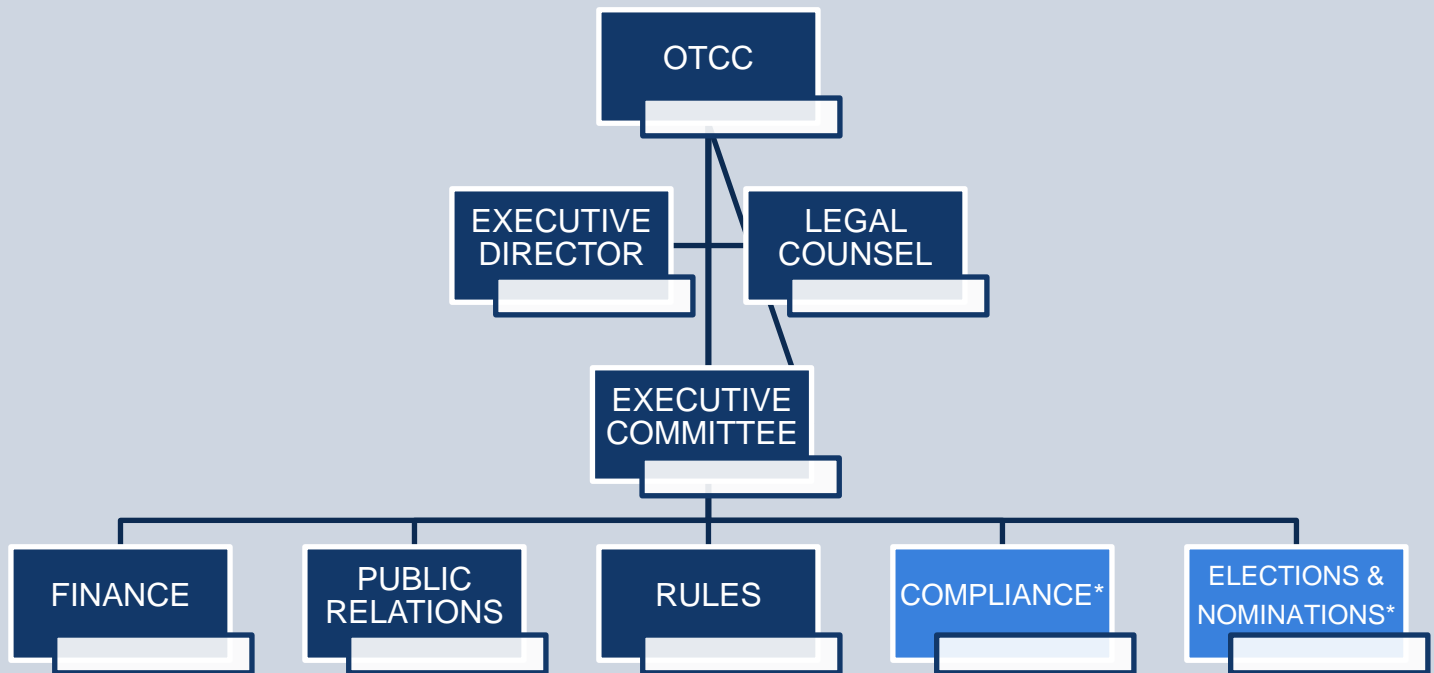
For further context, please reference the following resources:

- OTCC Model Legislation: Section 10
- OTCC Bylaws: Article 6
- Rule on Rulemaking: Section 1.3

OTCC COMMITTEE MEETING DATES

The OTCC Annual Business Meeting was on August 3&4, 2022			
Executive	Finance	Public Relations	Rules
September 12, 2022	October 19, 2022	November 14, 2022	October 18, 2022
October 17, 2022	November 30, 2022	January 17, 2023	November 15, 2022
November 21, 2022	January 18, 2023	March 20, 2023	December 20, 2022
December 12, 2022	February 15, 2023	April 24, 2023	January 31, 2023
January 9, 2023	April 4, 2023	May 15, 2023	February 21, 2023
January 24, 2023	June 5, 2023	August 21, 2023	March 28, 2023
February 13, 2023	October 3, 2023		April 18, 2023
March 13, 2023			May 16, 2023
May 1, 2023			June 27, 2023
May 8, 2023			August 22, 2023
June 12, 2023			
August 14, 2023			
September 11, 2023			
October 9, 2023			
Links to the agendas and minutes are available on the OTCompact Meetings Page .			

OTCC ORGANIZATIONAL STRUCTURE



*Will become active when the OTCC begins issuing privileges to practice

FINANCIAL SUMMARY

The OT Compact is an agreement between member states designed to facilitate the interstate practice of occupational therapy across state boundaries without having to become licensed in additional member states. Occupational therapists and occupational therapy assistants licensed in their Home State, which is a member of the OT Compact, are able to practice in other member states via a privilege to practice issued through the Commission. The purpose of the OT Compact is to increase public access to needed occupational therapy services by increasing access to care and providing mechanisms for continuity of care all while ensuring a higher degree of consumer protection across state lines. The OT Compact also promotes cooperation between member states in the areas of licensure and regulation. To join the OT Compact, a state must enact the model legislation into law. The OT Compact is governed by the Commission, a governmental entity made up of the member states. The Commission meets annually. The Commission has approved a Memorandum of Understanding (MOU) with the American Occupational Therapy Association ([AOTA](#)) and the National Board for Certification in Occupational Therapy ([NBCOT](#)), which covers the initial funding for services needed by the Commission. The Commission also has a MOU with the Association & Society Management International ([ASMI](#)) to act as the Secretariat for the Commission.

STATUS OF THE OT COMPACT

The OT Compact welcomed its tenth (10th) state with enacted legislation in June 2022; this allowed the Commission to become an active governmental body. As of July 2023, twenty-eight (28) states have enacted the legislation. The Commission is active, and Bylaws and Rules are approved. The Commission is not yet issuing privileges to practice, pending the development and implementation of a data system. Progress has been limited by the thoughtful development of the Commission's operational framework, including selection of a Secretariat, hiring an Executive Director, providing a point of contact for delegates and alternates, development of Bylaws and Rules, establishing an annual budget, etc., while using volunteer committees to carry out these requirements. Additionally, there are limited options for a commercially available database system that will allow member states to communicate applicant data and operational issues easily and efficiently to the Commission, and conversely allow the Commission to easily and efficiently transmit critical information and operational issues to the member states.

Revenue/Expenditures

The Commission has an MOU with AOTA and NBCOT to cover the initial funds necessary to operationalize the Commission. These funds are designated to cover secretariat costs, staffing, legal counsel, and professional fees such as website maintenance, Directors & Officers Insurance, and travel costs for OTCC staff and leadership.

The Commission is currently not receiving revenue through the Compact. The Commission has not yet determined if there will be an annual state assessment fee or the cost of the privilege to practice.

Other Information

As part of the MOU between the OTCC and AOTA and NBCOT, the organizations will continue to assume the operating expenses until the Compact becomes sustainable through issuing privileges to practice. The Commission will be responsible for maintaining the database and software systems to implement the Compact.

Data System

The data system development will begin in 2024. This is a joint effort among the Executive Committees and representatives from the Occupational Therapy Compact Commission, the Counseling Compact Commission, and the Audiology/Speech Language Pathology (ASLP) Compact Commission. The expenses for the data system are being shared between the three Commissions. This is a groundbreaking and unique undertaking which will provide the necessary data system that meets the needs of these three professions will laying a foundation for future professions who enter compacts and need similar data software solutions to operationalize their licensure privileges.



OT COMPACT COMMISSION BUDGET: 2022-2023

Approved by the OTCC Executive Committee: April 2023

ITEM	COST
Staff Support	\$50,000.00
<ul style="list-style-type: none"> Secretariat & Executive Director (ASMI) 	
Communications	\$203,332.33
<ul style="list-style-type: none"> Technology Access Website Maintenance & Hosting Database Maintenance & Hosting 	
Supplies & Equipment	\$416.67
<ul style="list-style-type: none"> Office supplies 	
Other Expenses	\$19,125.00
<ul style="list-style-type: none"> D&O Insurance Policy Legal & Professional contracts/services IT Services Travel Annual Commission Meeting 	
Total Budget	\$272,874.00

OT COMPACT COMMISSION FINANCIAL REPORT

Through September 30, 2023

Income	
<ul style="list-style-type: none"> AOTA* NBCOT 	
	\$150,000.00
	\$150,000.00
Total Income	\$300,000.00
Expense	
<ul style="list-style-type: none"> Interim Secretariat and Legal Counsel Services from CSG* Secretariat and Executive Director services from ASMI Legal Counsel Operating Expenses 	
	\$144,204.36
	\$50,000.00
	\$6,165.00
	\$932.36
Total Expense	\$201,301.72
Net ordinary income	\$98,698.28

*The first installments of the AOTA funds were received before the OTCC had an independent banking account established and were received by CSG on behalf of the OTCC. Expenses for the interim secretariat and legal counsel services performed by CSG were paid to CSG before the OTCC transitioned to their own banking account.

END OF DOCUMENT