

**Occupational Therapy Association of Oregon**

**Diversity, Equity, and Inclusion Task Force Plan**

**Winter 2020**

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# Background

AOTA (May 31, 2020) issued a *Statement on Justice and Systemic Racism*, acknowledging and condemning “the multifaceted aspects of systemic racism and oppression”. OTA0 (June 6, 2020) issued a statement confirming its stance as one “consistent with that of AOTA” and in “solidarity with all people who are impacted by racial disparity, oppression and bigotry.” An informal coalition of Oregon OT/OTA practitioners/students sent OTA0 a letter, stating that silence is no longer acceptable regarding the recent injustices and centuries of trauma experienced by the Black community and expressing their solidarity with Black classmates, colleagues, and community. They asked that OTA0 leadership stand by the association’s mission to advocate for and educate OTA0 members, and to address the ongoing injustices towards people of color and promote equity and inclusion as a human right.

During an OTA0 Board meeting (June 16, 2020), the Board agreed to create a task force to develop a plan for the association to address racial injustice. The OTA0 Bylaws (Article 5, Section 6.4, and Article 7.4) specify that:

a) the Board can create task forces to accomplish a definitive objective; b) a task force must have guidelines, approved by the Board, that specify functions and responsibilities; c) the task force Chairperson reports to the President as a non-voting Board member.

The following is submitted to the Board for discussion, amendment, and approval, to:

*Create a diversity, equity, & inclusion task force whose immediate focus is racial injustice.*

## Purpose of task force

According to AOTA (2020), *We must address the fundamental issues of diversity, equity, and inclusion beyond conceptual factors*. While important for AOTA and OTAO to condemn racial injustice, action is needed by OTAO to commit to and enact racial justice. In the words of Justice Based Occupational Therapy (June, 2020): *We are not fully animating our professional ethics if we do not address how racism affects our practice sites, interactions, selections of interventions, and therapy outcomes*. This is the time to be better humans, better OT practitioners, to support the Black community and people of color, and directly address the consequences of centuries of systemic and structural racism.

While critical for OTAO to take immediate action, this proposal is not the solution. Rather, this proposal provides a structured and intentional framework for an equity, diversity & inclusion task force to follow as it develops and submits to the Board a final plan of action for OTAO to address racial injustice.

The task force should be confirmed within two weeks of approval of this proposal, and:

- be coordinated by a chairperson or co-chairpersons appointed by the Board.
- consist of 6-12 members from diverse backgrounds.
- identify meeting times and a timeframe to complete its work.
- as needed, within 10 days, request meetings with OTAO Board or Executive Committee.
- report progress monthly to the Executive Committee.
- submit progress reports during regularly scheduled Board meetings. - ensure transparency of work and progress.
- submit a final action plan to the President within 3 months.

We acknowledge that OTAO is a volunteer organization – and only 10% of Oregon OT practitioners are members. OTAO has limited resources – personnel and financial. This proposal asks that Board members do extra work and that OTAO members step forward to volunteer their time and/or commit to being an agent of change for racial justice. We hope a bold and authentic commitment by the association will inspire OT practitioners to join OTAO.

Additional information is needed – this following proposal is not set in stone. As the task force continues to engage with its members and the broader OT community, and identifies resources/ partnerships to address racial injustice, modifications should occur, facilitated by the task force chairperson(s) under the guidance of the Board. Moreover, this task force should be the first step for the Board and the association to broaden its work to comprehensively promote equity, diversity & inclusion for the Black community, people of color, indigenous peoples, and people from marginalized groups. While racial injustice is the initial focus of this task force, occupational justice for all persons should become a primary focus for OTAO.

The following asks OTAO to examine its own organizational practices to ensure that social justice becomes an integral and sustainable component of how the association operates. This proposal asks that OTAO's mission and values be enacted to focus specifically on enacting social justice. One anticipated outcome of this task force is the establishment of a permanent equity, diversity & inclusion 'committee' (or comparable position) within the association.

# The Proposal

Any proposal must be in congruence and guided by the association's *Mission, Values and Purpose* (OTAO Bylaws, Article 3).

The mission of OTAO is to support our members and strengthen the occupational therapy profession through **advocacy, education, and networking**. The association's values: - OTAO values its members. - We value creating a strong community for practitioners to come together and grow. - We value providing education to support competent practitioners. - We value our members' ability to effect change in the occupational therapy community.

With these in mind, the aspirational, long-term outcome guiding this task force is:

*OTAO builds a community of practice* – “a group of people who share a concern or a passion for something they do and learn how to do it better as they interact regularly” (Wenger-Traynor, 2015) – *that engages in action steps to address systemic racism, promote social/occupational justice, and uphold human rights.*

This proposed task force is an initial step to help OTAO answer the question:

*How could OTAO address systemic racism and racial injustice while fulfilling its mission to strengthen the OT profession and support its members?*

The following outlines an intentional focus for the task force to comprehensively identify how OTAO might promote racial justice across four areas of its 'operations':

- a) education
- b) networking
- c) advocacy
- d) association structure/process
- e) recruitment

# Proposal Goal 1: Education

Created by: Mia Hughey, Janvi Patel, Lindsey Hoffman, Stacey Vieyra-Braendle, and Brittany Behrendt

## Education (OTAO Bylaws, Article 3 Purpose)

*B. Promoting excellence in the practice of occupational therapy;*

*D. Facilitating professional development resulting in competent, ethical, and quality occupational therapy practice, education, and research.*

Proposed long-term, aspirational goal to fulfill above purpose:

*Provide guidance, opportunities, resources, and experiences to OTAO members and OT practitioners that educate and empower practitioners to provide equitable and just services that address systemic and structural racism at all levels of OT practice.*

## Introduction

The Education Subcommittee recognizes that knowledge and access to educational resources lays the foundation for an occupational therapy student or practitioner to engage in self-reflection, practice skills, professional skills, and advocacy work that promotes values based in anti-racism, equity, and occupational justice. Access to tools to promote understanding and awareness are only one component in moving us towards being a diverse, equitable, and inclusive profession. Knowledge and training alone will not sufficiently promote growth without networking/human connection and advocacy for change at a systemic level. It is truly no match for the learning and unlearning that occurs with human connection and with the development of policies that will give OTPs the opportunity to interact with more people from diverse backgrounds and experiences. These educational recommendations thus overlap with other goals around networking and advocacy, to fully empower OTPs to provide equitable and just services that address systemic and structural issues at all levels of OT practice.

In order to ensure a formal commitment to providing CE opportunities and recruiting speakers that reflect diverse topics/backgrounds, OTAO will utilize the same spreadsheet criteria as in the networking section to determine if a person or organization aligns with anti-racist principles.

*Note: The above paragraph was not explicitly elaborated on in this document, though was discussed during subcommittee meetings. Please reach out to subcommittee members for greater elaboration as needed.*

The subcommittee has included a chart comparing our opinion of the level of effort required to implement some of the recommendations throughout this plan as well as the potential impact of each recommendation on a wide audience, in hopes to help the OTAO Board prioritize outreach.

Less Intense Effort		More Intense Effort	
HIGH IMPACT	UNKNOWN IMPACT	HIGH IMPACT	UNKNOWN IMPACT

Networking / Connection opportunities	OTAO Re-Wording Mission & Vision	Entry Level Practice Recommendations	Develop resources for OTPs use with clients
Sponsorship / Equitable support to underrepresented groups	Partnerships with local programs	OTAO creating action plan to support new Mission & Vision	
CEU / Resources Access	Self-Reflection Resources	ACOTE Standards advocacy	
	OTAO web resources (bulking up what's currently available)		

## Proposed Recommendations & Tools

### I. Education for Developing Professional Anti-Racist Practice Skills

1. OTPs need to develop professional anti-racist practice skills in order to provide care and work collaboratively with BIPOC clients. One way to undertake this initiative could include OTAO providing continuing education opportunities to OTPs to foster these skills:
  - a. Courses should require CEU validation for Oregon OTs and may include courses such as:
    - i. [Racial Equity Learning Modules](#)
    - ii. [Anti-Racism in Medicine Collection](#)
2. Similarly, OTAO can provide access to the following resources to OTPs across the state to enhance the rights of the BIPOC communities they service:
  - a. A Client Bill of Rights that can be printed, displayed, and utilized across practice settings to ensure inclusivity for all clients serviced
  - b. A how-to-guide for OTPs to conduct needs assessments or climate surveys with BIPOC clients in their place of work to better understand the BIPOC experience of occupational therapy
    - i. Encourage work places to submit the results of these assessments and surveys to OTAO to build a collective knowledge-base on current BIPOC client experiences so that communities can learn from one another
  - c. Develop with the input of BIPOC occupational therapy users across the state, a checklist that helps OTPs evaluate their current practices' effectiveness in meeting the needs of the BIPOC community
3. It is the goal of OTAO to provide educational opportunities for personal/professional development with the following in mind. These priorities in education should be reviewed when recruiting presenters and in CE offerings. It is recommended that OTAO set a goal to meet some of these objectives. Ensure that stakeholders such as the Conference and Continuing Education Committee Chairpersons are aware of the goals and timelines.

Consider utilizing available racial equity analysis tools/impact assessments to determine desired outcomes, how to engage stakeholders, and evaluate success indicators.

- a. Promote an understanding of: - racial injustice, e.g., systemic/structural racism, implicit bias, white privilege/supremacy - anti-racism and the work involved - lived experience of Black people and people of color - historical roots of racism, particularly in Oregon
- b. Provide opportunity for self-reflection to: - understand personal position within a society in which racial injustice exists - examine personal stance/perspective to address racial justice
- c. Develop practice skills to: - work intentionally with Black people and people of color who experience the daily effects of systematic racism, particularly on their mental, physical & spiritual health - respond to incidents of bias/racism that occur during client/practitioner interactions
- d. Develop professional skills to: - collaborate with health/human service colleagues to enact anti-racism work - effectively address macro- to micro-aggressions within place of employment - manage conversations/communication with staff regarding race and racial injustice
- e. Develop advocacy skills to: - effectively promote need for racial justice locally and nationally - enable communities of color to have their voices heard - effectively be an ally for equality, racial justice, and human rights

#### **IV. Supports for OT Programs**

OTAO recognizes that, to truly ensure occupational therapy practitioners are providing equitable and just services, educational opportunities and support must start sooner. We must make available high-quality anti-racist trainings and professional/personal growth opportunities to our students as well. Additionally, OTAO recognizes that an essential piece of learning and growth is the availability of positive environments for learning. Thus, OTAO may commit to the following:

1. The development of anti-racist supports and resources specifically for local OT/A programs, students, and educators to utilize. These should include but are not limited to:
  - i. Expansion of annual continuing education offerings (including conference) to specifically target local OT/A students and educators.
    1. Aim for 15% of offerings to target students specifically
    2. Aim for 10% of offerings to target educators specifically
    3. Create a “Student Track” at conferences, to include workshops and offerings hosted by professionals and students themselves. These workshops should not only support students’ clinical interests and growth, but also their professional development. Examples include:
      - a. Clinical interest topics: Combatting racism in medicine and/or research; decolonizing OT practice; general clinical interest topics
      - b. Resume workshops
      - c. Fieldwork panels: Affinity group conversations; discussions around modeling anti-racist practice; what to do if faced with racism in fieldwork; general fieldwork conversations

- ii. Utilization of outside trainers and resources that have developed high-quality programs that can be tailored to health professionals and educators.
  - 1. Models and resources include:
    - a. [PISAB](#)
    - b. [Resolutions NW](#)
- iii. Development of trainings and resources for educators on how to decolonize their classrooms.
  - 1. Models and resources include:
    - a. [Yvette Chavez](#) (speaker)
    - b. [POC Online Classroom](#)
- iv. Development of trainings and resources for educators on how to teach about racial justice.
  - 1. Models and resources include:
    - a. [Antiracist Pedagogy Collective](#)
    - b. [Anti-Racist Pedagogy in Action](#)
    - c. [Antiracist Pedagogy Reading List](#)

## V. Expansion of OTAO Website Resources

In order to increase access to information about systemic and structural racism, OTAO can establish a section of the OTAO website dedicated to occupational justice and anti-racism in OT practice. This section may include the following:

1. Free downloadable, informational sheets on the OTAO website
  - a. Client Bill of Rights
  - b. Quick facts/stats on health inequities and disparities in OT
  - c. Terminology sheets such as these from [Racial Equity Tools](#)
  - d. Information on analysis tools such as self-assessments and organizational assessments (examples listed below)
  - e. Tools for addressing microaggressions in the workplace, such as a “tip sheet” with [suggestions like these](#).
2. Links to outside organizations to improve access to resources
  - a. May include things like AOTA resources, local Showing Up for Racial Justice ([SURJ](#)) chapter, etc.
3. The addition of statistics to the “[History of OT in Oregon](#)” section to track progress on increasing diversity within the profession in our state
  - a. This could possibly be accomplished by survey or by advocating for/obtaining self-identification data during the licensing process
4. Newsletter submissions compiled and posted by OTAO but submitted by members
5. The reinstatement of [SIS forums](#) and creation of a forum for justice-based OT and anti-racism work
6. Book Club “starter kits” and facilitation guides to help practitioners start their own journal/book clubs, along with recommended readings and research articles
  - a. Recommendations for research articles with CEUs
    - i. For example, [this CE article on systemic racism](#)

## Proposal Goal 2: Networking

Submitted by: Alan Harris, Nicole Villegas, Dan Garrison, Kebra Rogers, Erin Taylor, John White

**Purpose:** Build relationships with groups/organizations within and outside the OT profession that work to promote racial equality/equity and seek to achieve social/occupational justice.

**Networking** (OTAO Bylaws, Article 3 Purpose)

C. Fostering collaboration between the Association, consumer, other agencies, organizations, and related associations to increase occupational therapy's influence in health promotion within health care and human service systems;

E. Providing members with opportunities for professional networking;

Proposed long-term, aspirational goal to fulfill purpose:

Build relationships with groups/organizations within and outside the OT profession that work to promote racial equality/equity and seek to achieve social/occupational justice.

As a first step toward this goal, with Board oversight, the task force will:

- Identify diverse groups/organizations that focus on social/occupational justice for liaison/partnership with OTAO.
- Identify mechanism within OTAO to promote membership in advocacy groups, e.g., AOTA Multicultural, Diversity, and Inclusion (MDI) Network
- Identify partnerships with other groups/organizations doing similar work as providers of health and human service, e.g. speech/language pathology, psychology, social work

### Introduction

The Networking subcommittee explored the concept of *relationship* in the context of networking. We recognize building community and connection, in relationships with groups, organizations and community members, as a powerful act to address racial inequities and social/occupational injustices. Networking provides an opportunity to engage in relationships, and the process itself can be a practice in social justice. Relationships are the foundation for being able to sustain longevity in work for racial equality/equity and social/occupational justice.

The following sections addresses taskforce requests to

- Identify diverse groups/organizations that focus on social/occupational justice for liaison/partnership with OTAO.
- Identify partnerships with other groups/organizations doing similar work as providers of health and human service, e.g. speech/language pathology, psychology, social work
- Identify mechanism within OTAO to promote membership in advocacy groups, e.g., AOTA Multicultural, Diversity, and Inclusion (MDI) Network

A barrier to engaging in purposeful networking can be a lack of shared understanding of what

“networking” means and why it is a priority. We asked, *What is the goal of networking? What type of networking are we looking to do? What type of relationships are we looking to create?*

Before identifying groups or organizations to network with, we asked, *How do we examine whether this relationship is in alignment with goals to promote racial equality/equity and achieve social/occupational justice?*

To answer these questions, we completed background research about networking already taking place at OTAO and how other health-focused state organizations are engaging in this work. We developed a list of criteria to guide the process of establishing relationships with groups/organizations and recommendations for use of this adaptable resource.

## **Background Research**

Background research was completed to understand what type of networking and relationship building is already happening at OTAO and how other health professional groups are addressing racial equality/equity and social/occupational justice.

### **1. Guiding Question 1**

From the consumer perspective, what groups/organizations is OTAO connected to already? How do they work together to promote racial equality/equity and to achieve social/occupational justice?

#### **a. Process**

Researched OTAO and OT communities from the consumer perspective via information accessible online.

#### **b. Results**

Linkedin <https://www.linkedin.com/company/occupational-therapy-association-of-oregon/about/>

OTAO has a listing but it isn't claimed or maintained by the organization. There are two employees shown although the information may be out of date. There is no content posting or linking to other organizations.

Facebook Groups for Occupational Therapy Practitioners

Occupational Therapy  
<https://www.facebook.com/occuthery/>  
Community  
Created 3/2009  
35k people like this group  
37k people follow this group  
“Occupational Therapy  
International Professional  
Integration Project”

The OT Hub  
<https://www.facebook.com/theOThub>  
Community Organization  
13k people like this group  
14k people follow this group  
Worldwide focus, based in  
England and Wales

Occupational Therapy Practitioners for Solidarity  
<https://www.facebook.com/otpractitionersforsolidarity>  
Created 6/7/2020  
~400 people like this group  
~400 people follow this group  
This group is much smaller but speaks specifically to the advocacy OTAO is reaching out to.

Occupational Therapy New Grads and  
Students  
<https://www.facebook.com/groups/newgradot>  
Public Group  
Created 12/2017  
20k members  
Worldwide focus, managed from UAE

Occupational Therapy Community by the  
OT Hub  
<https://www.facebook.com/groups/OccupationalTherapyCommunity/>  
Public Group  
Created 6/2017  
6.5k members

c. Comments

While this list is not all encompassing, it demonstrates the information/virtual spaces available to a non-OT consumer from basic searches. This list may be used to identify virtual spaces for connecting with OT community members and/or engaging with non-OT community members to promote occupational therapy.

2. Guiding Question 2

How are other health professional groups in Oregon and out of state networking to promote racial equality/equity and to achieve social/occupational justice?

a. Process

Direct emails to contacts at multiple state occupational therapy associations and Oregon health professional groups.

b. Results

State OT Associations

- Sought to answer this question with seven state OT associations: CA, CO, MA, MN, NE, SD, WA
- Variety in responses
  - Most slow to respond yet resulted in good depth of communication
  - Others did not respond to inquiries
- Inconsistency with outward facing, website-published information and information offered by direct contact.
  - Example: A state OT association with resources on their website yet not mentioning that they have an active AdHoc committee on DEI
  - Example: A state OT association with no information on their website but an annual conference with many relevant courses and resources

#### Oregon Health Professional Groups

- Website information varies from no statement to robust anti-racism/anti-oppression statements and resources. Some require using search features on websites to find information about their DEI work.
- Groups:
  - [American Physical Therapy Association Oregon](#)
  - [Oregon Association of Acupuncture and Oriental Medicine](#)
  - [Oregon Association of Naturopathic Physicians](#)
  - [OR Counseling Association](#)
  - [Oregon Medical Association](#)
  - [Oregon Speech-Language & Hearing Association](#)

#### c. Comments

Many groups are undergoing similar process work for racial equality/equity and social/occupational justice as OTA. This presents an opportunity for relationship building of aligned groups for resource share, process support and accountability. This can include consultation with group leaders for support in the process of integrating a new level of social justice in the structure of OTA; connecting with people in a similar experience may help maintain longevity in this work. Another example of networking structure may be a consortium of health professional groups with similar goals.

Many occupational therapy and other health professional groups demonstrate their DEI efforts through position statements, committees, fundraising on their website, although some information may be difficult to find. Some groups do not have this information online but they report engaging in the work. This is important to keep in mind when looking for groups to network with; building relationships will help to understand the process, offerings and needs.

# Proposed Recommendations & Tools

## I. Establish Relationships with Intention

Before identifying groups or organizations to network with, we asked, *How do we examine whether this relationship is in alignment with goals to promote racial equality/equity and achieve social/occupational justice?*

Clarifying the *why* and *how* of networking relationships is important when considering if the relationship helps promote racial equality/equity and achieve social/occupational justice. Criteria was created in alignment with OTAO Bylaws and goals of the DEI Taskforce to help guide the networking process. The criteria is formatted for ease of use on a [spreadsheet](#). The content and format can grow along with OTAO.

Spreadsheet content includes:

- Name of group/organization
- Criteria
- Contact information for organization (primary, secondary and community member)
- Contact information for OTAO representatives (at least two) who are leading relationship
- Dates of review/updates

Organization/ Group Name	Criteria										Contact Information			OTAO Representatives	Dates reviewed/updated		
	Priority Area (primary)	Priority Area (secondary)	Values Alignment	Promote racial equality/equity	Seek to achieve social/occupational justice	Local community reputation	Current relationship with OTAO	Type of relationship (expectations)	Mutual benefits	Challenges, risks, unintended consequences	Evaluation Criteria	Primary contact name, phone number, email	Secondary contact name, phone number, email	Community member contact name, phone number, em	Contact info for OTAO reps leading relationship		
EXAMPLE JBOT: Justice Based Occupational Therapy	Advocacy	Education	H	explicit	explicit	mixed	shared members	informational exchange	xxxxxx	xxxxxx	xxxxxx	xxxx	xxx	xxxx	xxx	xxxxxx	xxxx

This tool can be used to address two tasks as identified on the DEI Taskforce Proposal:

- Identify diverse groups/organizations that focus on social/occupational justice for liaison/partnership with OTAO.
- Identify partnerships with other groups/organizations doing similar work as providers of health and human service, e.g. speech/language pathology, psychology, social work

### a. Criteria

#### Priority Area (Primary & Secondary)

Per OTAO Mission & DEI TaskForce Plan. Which priority area does this partnership primarily/secondarily address?

Answer options: Advocacy, Education, Networking, Association Structure/Process

### Values Alignment

Compare OTAO and organization's values and assess how much they align. The association's values:

- OTAO values its members.
- We value creating a strong community for practitioners to come together and grow.
- We value providing education to support competent practitioners.
- We value our members' ability to effect change in the occupational therapy community.

Answer options: High (H) Medium (M) Low (L)

### Promote racial equality/equity

Per OTAO DEI TaskForce Plan. Review information about the organization. Identify the extent to which they promote racial equality/equity. If YES, they do promote racial equality/equity, is it explicit or implicit? If NO, they do not, then this criteria is not applicable. "Unknown" as an answer choice should be very rare, if at all utilized.

- Racial equality occurs when people of all races are provided the same opportunities and resources. It assumes people are at the same starting place regardless of race.
- Racial equity occurs when people are treated with justice and impartiality to support situational fairness and equitable opportunities, acknowledging the historic impact of systemic racism and bias.

Answer options: Implicit, explicit, unknown, not applicable

### Seek to achieve social/occupational justice

Per OTAO DEI TaskForce Plan. Review information about the organization. Identify the extent to which they seek to achieve social/occupational justice. If YES, they do seek to achieve social/occupational justice, is it explicit or implicit? If NO, they do not, then this criteria is not applicable. "Unknown" as an answer choice should be very rare, if at all utilized.

- Social justice is a perspective that has traditionally emphasised treating people with respect and equitable distribution of societal resources (e.g., wealth, opportunities, and privileges).
- Occupational justice is a type of social justice concerned with the rights of individuals and populations to have opportunities to pursue and engage in a full range of life activities (meaningful occupations) that support health, safety, and well being.

Answer options: Implicit, explicit, unknown, not applicable

### Local community reputation

This criteria invites discussion into the nuance of community impact. Discussion may reveal valuable relationships, conflicts of interest, avenues for connection

etc. How is the organization viewed by your shared stakeholders, and the larger community? Are there any benefits or concerns for OTAO to be associated with this organization? There may be various perspectives from diverse stakeholders.

Answer options: List/descriptive. Option to list the stakeholder group and name neutral, high acceptance/positive, low acceptance/negative.

#### Current relationship with OTAO

Identify current relationship between organization and OTAO

Answer options: May include: in partnership for x length of time; shared members; none

#### Type of relationship (expectations)

Identifies type of relationship between organization and OTAO.

Answer options: cost-sharing; sponsorship; giving/receiving of skills; consultation; community building events; communication with stakeholders; practitioner focused networking events; organization promotion/marketing etc

#### Mutual benefits

Describes immediate, short term, and long term benefits for community members (OTAO members, recipients of care, specific racial/social groups) and the organizations.

Answer options: Format: Community members: [immediate benefits], [short term], [long term]; Organization & OTAO: [immediate benefits], [short term], [long term]

#### Challenges, risks, unintended consequences

Describes any challenges to creating a relationship between the organization and OTAO; any risk to this partnership; and unintended consequences that may result from the partnership. Including, but not limited to, any range of challenges from community impact to legal implications.

Answer options: List/descriptive

#### Evaluation Criteria

How do we know the relationship is successful? Goals provide clarity to intention and next steps.

Answer options: 6 month goal & 12 month goal

#### b. Process

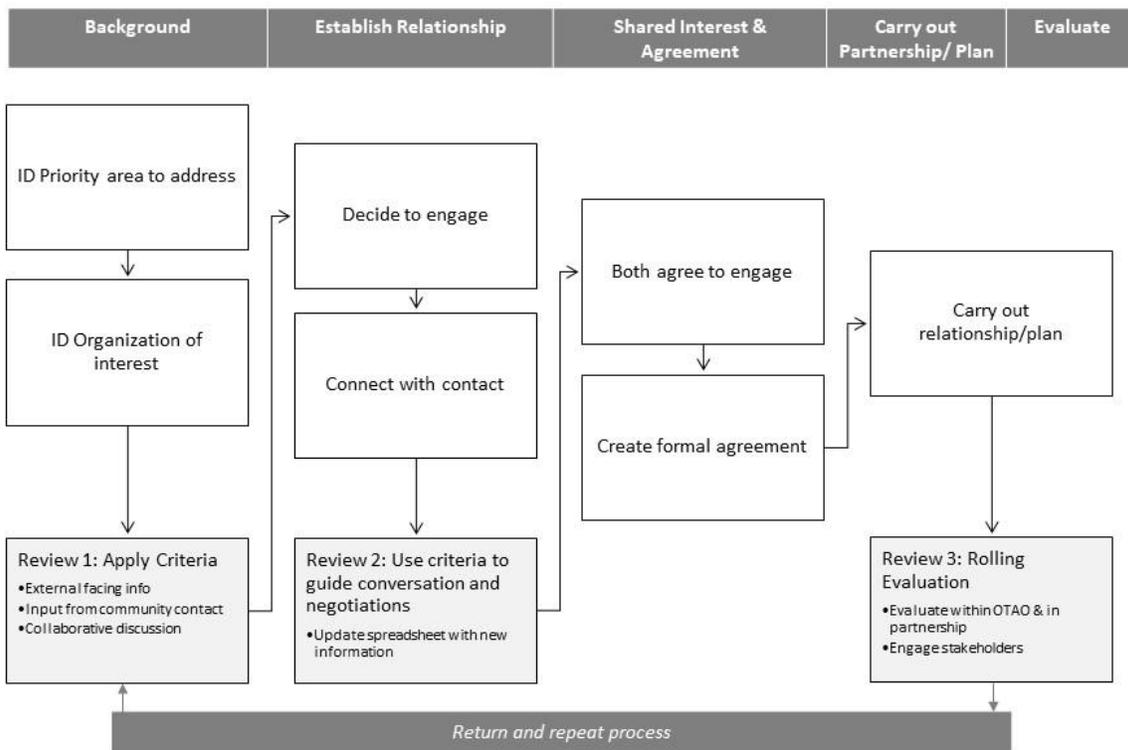
The criteria spreadsheet can be used as

- A shared, live document for multiple users
- A guide when discussing networking relationships

- A guide for establishing contracts for the networking relationship
- A tool to track networking relationships (relationship management)

These features create a centralized space for the information and notes, so that the relationship can be picked up by others if the OTAO representative(s) is unable to follow through with the relationship.

The following is a visual model is a proposed guide for the process of using the criteria spreadsheet. While the is presented in a linear form for clarity, there is expected to be movement back and forth between the steps and collaborative discussion and inclusion of stakeholders throughout.



Gathering criteria information for multiple organizations to assess interest in networking: If a goal is to gather criteria information from multiple organizations, a survey may offer an accessible way to do so. A survey of the organization's capabilities and values helps OTAO gather the same type of information from different organizations so they can be compared with each other. The survey may also prompt an organization to consider a greater variety of ways that their goals and the OTAO's mission might align, or that resources that the organization has might be useful to the OTAO mission.

c. For consideration

The following is a list of groups identified by committee members during an exercise in creating the criteria. They are provided to show a variety of potential community partners, and are not considered a complete list of recommended groups in any way; listed in alphabetical order.

- Coalition of Communities of Color
- Groups that we could serve: What could we offer to help do their job better? What would they want and be open to? (e.g. teach about sensory defensiveness; external structures that could be supported for deescalation vs escalation)
  - Local law enforcement agencies: Police and Sheriff Public Libraries
  - Homeless support organizations
  - Maternal Health organizations
- JBOT: Justice Based Occupational Therapy
- Health care and insurance organizations that have programs or departments that specifically address health care disparities on equity lines.
- Medical manufacturers that have/want to make a commitment to racial equity and product accessibility, either through an internal program or through partnership with an outreach organization
- NAYA - Native American Youth & Family Center
- Nike (flyEase)
- Occupational Therapy Association of California
- Tech Town PDX
- Western Regional OT Spring Symposium

## **II. Be a Connector**

OTAO plays an important role in connecting members with advocacy groups. Member engagement in these groups can help promote racial equality/equity and achieve social/occupational justice. There must be a relationship between OTAO and members where communication about recommended advocacy groups is accessible and there is trust in the content OTAO presents. To develop a list of mechanisms, the subcommittee looked at what current routes of communication exist and how to harness the relationship with members to connect them to advocacy groups.

The role of connector can go beyond presenting a list of advocacy groups. To facilitate relationships between OTAO members and advocacy groups, create a personalized and experiential approach as much as possible.

This addresses the third task identified on the DEI Taskforce Proposal:

- Identify mechanism within OTAO to promote membership in advocacy groups, e.g., AOTA Multicultural, Diversity, and Inclusion (MDI) Network
- a. Mechanisms
- Online resource list of advocacy groups (See section on Education that outlines an online platform)
    - See information in Advocacy section

- Identify/ introduce readers to a volunteer member to field questions from OTAO members (not only info@orgname.com)
- Highlight advocacy group resources
  - In a resource collection, include resources/education from advocacy groups and within the text highlight a link advocacy groups' websites
- Make it personal | Specific Invitations
  - Create an online/website short questionnaire that asks members about their interests and results in 1-2 recommended advocacy groups for them to explore.
  - Send invitations to OTAO members to engage in a specific advocacy group or to help them with a project. Consider one invitation per month or quarter.
- "Meet Us"
  - Host brief interview conversations with advocacy group members/leaders to promote their work. Provide videos on OTAO website, social media or in newsletter.
  - Quarterly introduction article about the group in OTAO newsletter or social media groups
  - Invite to online Community Fair (e.g. Zoom meeting) where each group presents (this could be an efficient way to gather content for sharing videos/articles about their work)
  - Invite advocacy group member/leader to present at OTAO Night Out events

### **III. Practice Informed and Compassionate Communication**

OTAO will be establishing new relationships (networking) with groups and organizations who may have been working thoughtfully on issues of racial justice and inclusion for a long time, or they may be just starting out. It is important to consider how interest in collaboration is communicated and how inquiries are made. This is a short list of approaches that may be helpful when reaching out to establish new relationships:

#### **Informed outreach**

- Continue to learn and evolve in your personal anti-racism and social justice work.
- Complete background research to understand the group/organization you are approaching, including what language they use to describe their work.
- Write from your (individual) voice and describe why you are representing OTAO.
- Acknowledge the group/organization's work in your correspondence and describe why it relates to OTAO.
- Ask for any preferences of who they interact with in the organization and how (race/ethnicity/background/gender/role in community).
- Recognize and give gratitude to the community member providing a "warm handoff," if applicable.

Increase likelihood of response/interaction (via email) - *do the work* and *make it easy* to respond

- Make subject lines personal (e.g. "Referred by x name.."); ask community contact to make an introduction via email if possible.
- Provide links to OTAO websites so that they have the information accessible to learn about the organization

- Make any requests clear
- Offer alternative ways to follow up, consider accessibility needs and preferences

The people who represent the groups/organizations of interest may respond or not respond for a variety of reasons. Enthusiasm to share their work may drive a response. Lack of having something to share may present a barrier; shame or fear may come up. There may be implied judgement when receiving an inquiry about a group's efforts in racial equality/equity and social/occupational justice. Clearly communicate that it's more important to connect and have a conversation, even if it's uncomfortable, than hear no response.

This emphasizes the layers of relationship when networking. While there is no "one size fits all" approach to networking or being in relationship with a community partner, there are important considerations when pursuing partnerships that prioritize racial equality/equity and social/occupational justice. From one person who is reaching out to another, to the larger groups and organizations they represent, to the communities they impact, it's vital to communicate compassionately. Communicate to uplift, learn and share. Build relationships on foundations of openness and respect.

From Education Section:

#### **IV. Community Learning and Self-Reflection**

1. Learning through human connection was deemed to be integral to anti-racism work. OTA0 can foster an environment that allows OTPs to network, connect, and learn from one another by creating ongoing opportunities for community learning focused on racial justice including:
  - a. The establishment of one "OT Night Out" per quarter focused on racial justice topics
    - i. Topics can include, but are not limited to: medical racism and health disparities, occupational injustice, implicit bias, antiracism and OT, macro- and microaggressions
    - ii. Anti-racism resources for discussion
  - b. The facilitation of a book club featuring works related to anti-racism
    - i. Racial Justice, Racial Equity, and Anti-Racism Reading List
    - ii. New York Times Anti-Racism Reading List
  - c. The creation of a mentorship program for students and new graduates from underrepresented communities to promote resiliency, reduce isolation, and provide a platform for guidance
    - i. Promote the program in OTA0 e-newsletters and webpages and provide opportunity for all OTPs from underrepresented communities in OR (regardless of OTA0 membership) to sign up to be a mentor via OTA0 website
    - ii. Communicate with OT/A school liaisons to promote the program to students and new graduates
    - iii. Guide to Creating a Mentorship Program
  - d. The recognition and celebration of cultural heritage months

- i. Include information and resources about each Heritage and/or History Month on OTAO’s “bulletin board” (home page)
      - 1. For example, during the month of February, include links about Black History Month and its associated events
  - e. Conduct ongoing climate surveys in order to guide the delivery of resources and support
    - i. UMich example survey
- 2. Similarly, another component integral to anti-racism work is self-reflection. OTAO can provide resources for OTPs in Oregon to begin their personal journeys in anti-racism. In addition to community and connection, self-reflection ensures that anti-racist work takes a deep, personal significance to OTPs. Ways that OTAO may be able to guide OTPs in Oregon to engage in self-reflective, anti-racist work include:
  - a. Access to cultural self-assessments curricula and cultural competency tools on OTAO website both for free and/or with membership access:
    - i. Self Assessments from National Center for Cultural Competency
    - ii. Cross Cultural Competency course
    - iii. Personal Self-Assessment on Anti-Bias Behavior
    - iv. The Anti-Racism Starter Kit
    - v. Anti-Racism Self Assessment Tool from Renee Wells
  - b. The creation and sponsorship of ongoing affinity groups that meet regularly (as predetermined by each group). Groups would be run by volunteer practitioners within the OTAO community as vetted by OTAO. These groups can be virtual or in-person (as safe and appropriate) as a means to provide a space for OTPs to share their self-reflections within a semi-structured format.
    - i. Possible Affinity Groups: Black, White, Hispanic, Non-Black People of Color, LGBTQ+, etc.

Encourage participation by students.

## Proposal Goal 3: Advocacy

Created By: Tess Sorensen, Mara Erb, Katie-Ann Kailey, Claudia Anukam, Karen Peasley, Kelsey Koll

**Purpose:** Model how an OT professional organization can advocate for and take action that promotes diversity, equity & inclusion for OT practitioners, clients, and the community.

**Advocacy** (OTAO Bylaws, Article 3 Purpose)

A. Supporting its membership by providing direction and vision for the profession;

Proposed long-term, aspirational goal to fulfill purpose:

*Model how an OT professional organization can advocate for and take action that promotes diversity, equity & inclusion for OT practitioners, clients, and the community.*

As a first step toward this goal, with Board oversight, the task force will:

- Propose creation of networking opportunities to support OT practitioners/colleagues of color who experience effects of systemic and structural racism.
- Identify how OTAO can act to redress the deep roots of systemic racism that lead to health disparities among the Black community and people of color.
- Explore partnership with Oregon OT Licensing Board to address CE requirements that focuses on equity, diversity & inclusion and anti-racist work.

### Introduction

In order to create a thriving, diverse, and inclusive environment for practitioners, clients, and the community we believe that OTAO should advocate for:

- Changes in the current cultural competency CEU requirements
- Multiple points of entry into the profession and improved ACOTE standards at the National level
- Consideration of OTAO conference presentation content
- Diverse recruitment into the field
- Increased diversity of representation on OTAO and AOTA boards

When referring to diversity we are including race, gender, sexual orientation, nationality, ability, socioeconomic status, spirituality, background, and other things that make people unique.

Compensation for emotional labor, time, energy, intellectual property is mandatory!

### Proposed Recommendations & Tools

#### I. Considerations for Cultural Competency CEU Requirements

If we created an entire task force to address DEI with a 5 year plan, one hour of CEU in no way is sufficient to address these concerns, we should start with a strong statement by recommending much more than 1 hour of CEU to demonstrate the gravity and importance of this issue.

- Adding a reflection component (reflecting on how one has incorporated their learning into their practice)

There is no number of hours that is going to be “enough”

- Consider increasing the number of required hours for a DEI requirement to more than 1 hour
- Continuously ask for feedback on how to improve the format of this education
- Think of something that could connect the sessions or encourage people to do more research afterwards

This work and knowledge base is always EVOLVING

- Have links to reputable sources to provide definitions for terms commonly used in the course or to provide links for further learning

This work should be intersectional

- Consider how one aspect of diversity intersects with other identities (race, class, age, ability/disability, gender, sexual orientation, national origin, immigration status)

AOTA publications for consideration:

[Continuing competence standards for AOTA](#)

[Continuing education article published by AOTA](#) on systemic racism

## II. National Level Advocacy

### 1. ACOTE Standards

- OTAO could advocate with national level groups to increase specificity of standards to require increased education specific to current and historical systemic barriers that impact occupational justice of persons, groups and populations. This should include the creation of an anti-racism public health curriculum competency, requiring all occupational therapy professionals in OR to acknowledge social determinants of health/ occupational injustices. The standards lack specificity regarding the impacts of systemic and structural racism that is a significant health impact on persons, groups and populations.
  - See standards B.1.2 and B.7.0 of ACOTE Standards

### 2. Entry Level Practice Requirements

- OTAO could advocate for a review and change to practice requirements and skill certification to promote increased access to the profession. Established data shows that advanced degree fields are dominated by white males, and the achievement gap has been linked to race, gender, socioeconomic status in countless articles. Other international systems and professions use different methods to differentiate levels of expertise. The Band System in the UK uses an entry level bachelor’s degree to enter the workforce and additional training, years of experience or coursework to

advance to higher bands with increased need for specialty skill or focus. Skilled Nursing utilizes many different entry points to health care that can be advanced throughout a person's career or enrolled in successively, from an associate's degree to a doctoral nurse practitioner, with distinctly different licensure rules that highlights the difference of each skill level within the profession.

- i. National Center for Education Statistics
- ii. Sex, Race, and Ethnic Diversity of U.S. Health Occupations

### **III. Considerations for OTAO Conference Presentations**

When people present proposals for OTAO conference presentations, consider including a statement like the one below:

1. Values of diversity and inclusion are important to OTAO and are needed in order to grow our profession. We are asking all applicants that present at this conference to reflect on how your work represents elements of considering a diverse client base or a diverse set of practitioners
  - a. Are your references for your research all written by people of the same gender? Class? Race? Ethnicity? Nationality?
    - i. Is this imperative to your topic? And if not, how could you go about incorporating another perspective?
    - ii. If it is imperative to your topic, can you make a note of this limitation in your presentation perhaps with a call to action of more research in the field?
  - b. Does your presentation on the new use of a modality take into account the effects of the modality on people of different body types?
  - c. Does your presentation on the CIMT protocol consider how it can be adapted for someone who attends religious services 5x/day and needs to use both of their hands?
  - d. Does your presentation on the role of OTs in the school setting include voices of practitioners with disabilities who face a unique set of challenges when approaching their work

### **IV. Considerations for Diverse Recruitment into the Field**

In order to increase the efficacy of the OTAO board, it is necessary to not only diversify the board itself but the profession as a whole. We believe that OTAO can take on a role in increasing diversity and inclusion in the profession.

1. Partnering with middle and high schools to provide programming related to the profession may increase diversity of applicants to OT/COTA programs
  - a. Attend/present at career fairs
  - b. Provide free or low-cost programming to middle and high schools
    - i. Focus on schools that do not currently offer healthcare pathways
    - ii. Work with OTAO members to provide programming in their communities
    - iii. Partner with current programs/organizations that provide hands-on opportunities, i.e. Go Baby Go

2. Partner with OT/OTA programs in Oregon
  - a. What support can OTA provide in terms of reaching those who are seeking career changes/grad school options?
    - i. OTA website to add a page with links and information regarding steps to applying to OT programs and decision-making (why become an OT?)
  - b. OTA connect with student OT associations to provide professional outreach
  - c. Connect prospective and current students (and OTA members) to other professional organizations/programs that provide support, training, and mentoring to BIPOC students/professionals and other diverse groups.
    - i. I.e. COTAD, Network for LGBTQIA+ Concerns in OT, Asian/Pacific Heritage Occupational Therapy Association , etc.
  
- b. Support local OT/A programs, students, and educators in increasing access to national OT efforts and organizations focused on anti-racist education, occupational justice, and support for students from underrepresented communities. This can include, but is not be limited to:
  - i. Creation of stronger connections and relationships with SOTA chapters. This can be done by:
    1. Attendance at SOTA meetings (executive board or general membership meetings) 1x/quarter.
    2. Expansion of opportunities for liaisons from SOTA chapters to become more involved in OTA operations as they are able and interested.
      - a. Can work with SOTA chapters to refine the job duties of the OTA Representatives to facilitate a stronger relationship.
  
- c. Work with local SOTA chapters to increase recruitment efforts in younger schools and amongst a more diverse body of students. Our profession is largely composed of white women, and we cannot claim to truly serve our communities and clients if we are not representative of them.
  - i. Aim to host 1 recruitment event per year at the elementary, middle, and high school levels.
  - ii. OTA to support SOTA through:
    1. Donation of funds for supplies needed for recruitment events
    2. Donation of OTA paraphernalia to promote the state organization
    3. Co-creation of materials that can be used to educate students on the profession and pathways into the profession
      - a. Example: AOTA's "Promote the Profession"
    4. Attendance at at least 1 recruitment event
  
- d. Recognition that it is unethical to recruit students from underrepresented communities without also planning for how to retain these students. Thus, OTA will:
  - i. Provide support in creation of local COTAD and National Black OT Caucus chapters. This could include:
    1. Sponsoring application fees
    2. Reviewing application materials
  - ii. Provide mentorship opportunities while in OT/A school

- iii. Advocate for flexibility from OT/A programs to accommodate learners with additional family and financial constraints

Create a more inclusive\* culture at OTAO to increase diversity of members.

\*Inclusion refers to the practice of making all members of an organization feel welcomed and giving them equal opportunity to connect, belong, and grow—to contribute to the organization, advance their skill sets and careers, and feel comfortable and confident being their authentic selves.

1. Review the culture of the association for inclusion because representation is important and people need to feel comfortable to access the association
  - a. Where are there blind spots?
    - i. Who has a voice in the organization and who is not at the table/not being heard?
    - ii. Provide mandatory training regarding diversity, equity, and inclusion related to positions for all board members
    - iii. Expand board recruitment
      1. Refer to board recruitment section for more recommendations
    - iv. Expand methods of recruiting OTAO members
      1. Social media, events, email, etc

## V. Considerations for Representation on OTAO and AOTA Boards

We recommend that OTAO take steps to further diversify its elected and appointed positions.

1. Evaluate recruitment practices to ensure a variety of practitioners are encouraged to apply
  - a. Where have we advertised? Have we made regular and frequent attempts to reach OT practitioners through a variety of means? (e.g., message boards, work sites, social media, OT Facebook groups (LGBTQ+,BIPOC, OTs with disabilities) LinkedIn)
  - b. Can we desegregate OTAO member data in order to target recruitment?
2. Consider reducing the barrier to entry (10 regular members must sign petition - this may be difficult for practitioners who work in rural/remote areas)
3. Consider verbiage in postings that specifically encourage a variety of applicants
  - a. Example from HDESD job posting: *“Importantly, we recognize and honour that the qualifications required to excel in this position can come from a range of both professional and lived experiences. Below we describe what we believe to be important qualifications for a candidate to have while remaining open to the diversity of experiences that can lead to these skill sets. Position descriptions are often presented in a way that leaves qualified candidates feeling unwelcome, intimidated, uncomfortable, and/or unqualified to apply. **Recognizing that, we strongly encourage anyone who feels passionate about this work and believes they have what it takes to thrive in this role to apply.**”*
4. Seek feedback from under-represented groups on our advertising copy and placement
  - a. Provide compensation for this work
5. Encourage current practitioners to refer colleagues/contacts

6. Evaluate OTAO “brand” - are we reaching a diverse group of practitioners in our ads, literature, etc?
  - a. Are people able to see themselves in OTAO?

We recommend that OTAO advocate for AOTA to further diversify its elected and appointed positions.

1. OTAO may give examples of efforts they have made or share ideas above
2. Encourage extending the recruitment window from 6 weeks to 12 weeks

## Proposal Goal 4: Organization Operations & Policy

Created by: Mia Hughey, Janvi Patel, Lindsey Hoffman, Stacey Vieyra-Braendle, and Brittany Behrendt

### Organization

Operating an efficient, effective, and fiscally responsible organization that is responsive to its members' needs.

Proposed long-term, aspirational goal to fulfill purpose:

*Ensure that equity, diversity & inclusion is embedded throughout the association's mission, vision, values, structure, process, communications, and actions.*

As a first step toward this goal, with Board oversight, the task force will:

- Develop an action plan for OTAO that reflects an authentic commitment to equity, diversity & inclusion and specifically addresses racial justice.
- Propose plan to audit effectiveness of action plan to promote racial justice.
- Recommend re-structuring of OTAO policies/procedures to specifically ensure equity, diversity & inclusion are considered explicitly during decisions, actions, and governance.
- Recommend a plan to ensure that each Board member understands and commits to their responsibility as a steward of OTAO to promote and enact racial justice.

### Proposed Recommendations & Tools

1. Organizational Mission and Vision/Needs Assessment  
Including assessment and changes to the organization's operations and policy allows OTAO to model investment in diversity and inclusivity through best practices of organizational leadership. OTAO executive board (and other relevant members) will utilize anti-racism resources to engage in assessment of organizational mission and values and commit to integrating effective occupational justice and/or racial justice tools. OTAO will identify how to include necessary emphasis on racial justice and equity.  
[Organizational self-assessment related to racial equity](#)
2. Action
  - a. Use Racial Equity Analysis Tools to conduct deeper assessments as to how policies, programs, and decisions impact communities
    - i. [Questions to consider when creating a Racial Equity Impact Assessment](#)
    - ii. Ex. [Seattle Race & Justice Initiative Racial Equity Toolkit](#)
    - iii. Ex. [SPS REAT](#)
  - b. Training/education for members in leadership positions that reflects commitment to racial equity/racial justice/bias/culturally responsive leadership
  - c. Policy updates to reflect values of justice and equity within the profession and changes that were indicated as an area of need on the organizational assessment
  - d. Leadership positions dedicated to ongoing improvements in the areas of: racial justice, occupational justice, diversity and inclusion, education.
    - i. This can include committee, special interest section, adding diversity components to existing committee/SIS

- e. State Conference changes to increase diverse participation in state run conferences
  - i. Volunteer support
  - ii. Compensation
  - iii. Prioritizing conference time slots or advertisement
  - iv. Include diversity/inclusivity as part of review process for conference submissions
  - v. Publications with increased focus on professionals from a diverse background.
- f. Lobby support at the state level for legislative action related to health/policy equity

## Proposal Goal 5: Recruitment

### Recruitment

G. Recruitment for future taskforce members.

In order to determine the structure, scale, and scope of the future task force, the board should identify top priorities for OTA from the recommendations provided by the current DEI task force to determine the optimal structure moving forward. This will help to provide a picture of the work that can be reasonably accomplished from volunteer members.

Proposed long-term, aspirational goal to fulfill purpose:

*Recruit within and outside the OT profession taskforce members that are committed to promote racial equity and seek to achieve social and occupational justice.*

As a first step toward this goal, with Board oversight, the taskforce will:

1. Identify methods of recruitment
2. Identify methods of information delivery
  - a. What is the essence of the taskforce message we are sharing
3. Outline scope of recruitment
4. Identify and outline a transition plan

### Proposed Recommendations & Tools

Summary of recommendations for the top priorities for the next phase:

- 1) Identify the DEI Taskforce point person (new OTA board member position?)
- 2) Propose a structure and time commitment for the taskforce positions
- 3) Create a FAQs document/website link
- 4) Collaborate with networking committee on scope of how/where recruitment is to occur

#### I. Identify methods of recruitment

1. Collaborate with Networking committee
  - a. OT schools in Oregon, social media platforms & online student cohorts, community groups and organizations, CEU/conference/workshop events (pertaining to cultural competency or DEI) for OT and non-OT health professions
    - i. Provide follow up email as form of recruitment after individuals receive their CEU certificate in cultural competency
  - b. Who are we referring interested individuals to contact next? (ties into 'transition plan' below).
    - i. Preferred this not be the DEI taskforce board member's responsibility. Rather an assistant or designated role that is the contact person between interested parties and DEI taskforce committees.
    - ii. Create a FAQs document or link on the website to ease the repetition of specific questions. Include contact info of DEI board member or specified individual that will manage recruits.
      1. "How long will it last?"
        - a. Ask: How long do you feel comfortable committing your time?

- b. Get a pulse/survey of what people are interested in doing.
- 2. “How many other people will be working on this?”
  - a. Recommendations to OTAO on min/max size of taskforce members vs volunteers (see ‘transition plan’ below)
- 3. As a bonus to doing great work, consider providing information on how this volunteer position can be utilized to claim CEUs. Per NBCOT page 16 under ‘ID#9’
  - a. [https://www.nbcot.org/-/media/NBCOT/PDFs/Renewal\\_Handbook.ashx?la=en](https://www.nbcot.org/-/media/NBCOT/PDFs/Renewal_Handbook.ashx?la=en)
  - b. 18 CEUs can be claimed over 3 year period pertaining to ; 5hr = 1 CEU

## II. Identify methods of information delivery

1. What is the essence of the taskforce message we are sharing?
  - a. Sound bite
    - i. “This is an emerging taskforce that was created this year. You can help to address systemic injustice in the OT profession. It’s volunteer, you can get involved. Talk to me if you want to.”
    - ii. “This is a brand new thing that OTAO is taking on. If you have a passion for it or see an injustice out there, it’s a way to get involved to make change. It’s grassroots and volunteer.”
  - b. Business cards or pamphlets, link to website, email to DEI taskforce board member/ contact
    - i. Due to COVID, may need to consider primary recruitment strategies to be virtual (with an in-person plan when things hopefully settle down).

## III. Scope of recruitment

1. Collaborate with networking and current OTAO membership recruitment on methods and scope of recruitment.
  - a. Highlight potential or developing partnerships (collaborate with Networking committee)
  - b. Pacific University & Linn Benton CC, social media platforms & online student cohorts, community groups and organizations, CEU/conference/workshop events (pertaining to cultural competency or DEI) for OT and non-OT health professions
  - c. Johanka’s cousin & his fiancée are members of Rose City Justice. They are willing and able to discuss options on connecting to the community and individuals interested in furthering their work in injustice

## IV. Identifying transition phase

1. Task force transition plan
  - a. Term timelines? See section below “structural components”
  - b. Essential information to carryover - What would tell someone else to do once you are no longer serving in your position? This would be part of the month 10-12 transition (described in section “structural components” below)
  - c. Contact/ point person for potential task force members and/or volunteers?
    - i. Identify/describe this potential role
    - ii. Identify if this will be the (elected) OTAO board member or a separate position

- iii. Will this individual grant access for new task members to google doc? Should there be a link on the OTA0 website that has an embedded link with access to the google docs for the members or public to access?
- d. Ideas provided by members
  - i. Phased approach: after 3 months Tier 1 group has the option to transition out and Tier 2 group can transition into Tier 1 and serve for 1 year. New Tier 1 leaders could then develop constituency/affinity groups as well as track and monitor that proposal tasks are being carried out. A new Tier 2 group will ideally have been recruited by this time.
    - 1. Need to fine tune how to rotate through positions so that it includes a handoff
  - ii. Work with the OTA0 board on identifying how to increase recruitment as part of their current operations.
    - 1. Jeff Lango, Kristy Fleming and Daniel C manage memberships [membership@otao.com](mailto:membership@otao.com)

## V. Structural Component Ideas

1. Time Commitment
  - a. Suggested initial 1-year commitment (calendar year; or sign-on start date) Who does this apply to? Leaders, subcommittee, and/or all members?
  - b. Ability to opt-in to additional 1 year in current role, for example:
    - i. If working on a major project
    - ii. Engaged in relationship based tasks with community
      1. If member finds they have bandwidth and capacity to carry on a second 1 year term
      2. Per annual term:
        - a. Month 1-9: working on items from task force plan
        - b. Month 10: determine if continuing in current role or training replacement
        - c. Month 10-12: begin training replacement member for carry over of tasks
2. Size of Task Force
  - a. Size of the task force will be challenging to determine and could be based on potential participant's interest in order to create a final amount of members. However, a limit or cap of members should be instituted in order to keep the group manageable and communications sustainable.
  - b. This is where identifying back-up, or relief, participants will be critical to ensure there are enough people to help carry out tasks.
  - c. This can be done in a number of ways:
    - i. Continue the tiered approach [current] of membership where higher level tiers have a relatively larger workload compared to lower level tiers.
      1. Each tier is involved in different types of work (i.e. more involved work versus less involved work).
    - ii. Create task oriented sub-committees where each 'primary' task force member is responsible for ensuring completion of various tasks. This can include overseeing a smaller group of people to help with task delegation.

1. Individual committee members are responsible for role delegation and determining who does what - however, all members within a sub-committee share a common goal.
2. This approach would not need to be time limited, rather determined based on goals.
3. Structural example:
  - a. Let's say there are 4 Task Force Members. Each member is responsible for a different "task" (ex: 1. community partnerships, 2. education, 3. recruitment, 4. representation at conferences, etc.)
  - b. The 4 members each oversee a subcommittee that works to complete their assigned task
  - c. Subcommittee can be composed of various amounts of people based on the size of the task.
  - d. So, there would be 4 subcommittee members with various levels of people helping in their subcommittee. These helpers could be carried over from the recruitment efforts of the task force and potentially be people that did not want a 1-year commitment but did want to be involved. Subcommittee members would be involved as long as needed based on the task. They can choose to continue when/if new tasks arise and they can commit to join another subcommittee.
- iii. A standard governing approach with set roles that must be filled, like how a board operates or the current OTA structure.
  1. This approach is time limited compared to the approach outline above. These can be based on the goals that the task force determines it would like to commit to in a certain amount of time.
  2. For example: in the next 2 years we want to focus on A, B, C, therefore, we assign roles for A, B, and C and the task force has members/students/volunteers work on A, B, C in the given time frame.

Submitted by:

Elizabeth Martin – Chair

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Note: This proposal was developed in consultation with Liz Miller, OTR/L, OTAO President and members of the OTAO board.

## Glossary of Abbreviations

The following is a list of terminology that will be utilized throughout the proposal:

BIPOC: Black, Indigenous, and People of Color

COTAD: Coalition of Occupational Therapy Advocates for Diversity

DEI: Diversity, Equity, and Inclusion

OT: occupational therapy

*Note: When OT is referenced, we are often referring to occupational therapy as a whole (i.e. the field and its practice) rather than a provider.*

OTAO: Occupational Therapy Association of Oregon

OT/A: Occupational Therapist and Occupational Therapy Assistant

OTPs: Occupational Therapy Professionals

*Note: For the purpose of this proposal, we have defined occupational therapy professionals to include registered / licensed occupational therapists, certified/licensed occupational therapy assistants, and occupational therapy students of either occupational therapist or occupational therapy assistant programs.*

SOTA: Student Occupational Therapy Association