

2024 ILOTA Annual Business Meeting

November 13,
2024
7:00 pm



Illinois
Occupational
Therapy
Association



ILOTA Annual Conference

November 22-23, 2024

NIU Conference Center, NIU



- Conference Coordinator: George Buckley, ED
- Conference Co-Coordinator: Anne Kiraly-Alvarez, Beverly Menninger
- Conference Committee: Dalmina Arias, Maud Makoni, Stephanie McCammon, Marie-Claude Touchette, Evguenia Popova, Susan McKay, Gabriella Carmona, Carson Lane
- Keynote-Victoria Garcia Wilburn and Plenary Speaker-Lori Basey
- All conference presenters and live session facilitators
- All attendees





**Midwestern
University**

**POSITIVE
OUTCOMES**
Providing for Providers



point designs

**Thank you to our 2024
ILOTA Conference
Sponsors!!**



**ALLIED THERAPY
PARTNERS**



RCM Health Care Services
Committed to Caring



NIA | THE NORTHWESTERN
ILLINOIS ASSOCIATION



-
- Visit the ILOTA tables at Conference!
 - Buy raffle tickets at conference to support our AOTF Illinois Endowed Scholarship funds!
 - Donate to the Illinois Occupational Therapy Political Action Committee (ILOTPAC)!



President Report

Beverly Menninger



ILOTA Updated Strategic Plan 2024-2027

- Strategic Planning Session facilitated by Mariam Huss, Axxum Consulting -Sept. 2024



axxum
CONSULTING



Illinois
Occupational
Therapy
Association

Strategic Plan

ILOTA

2024-2027

www.axxumconsulting.com

Mission, Vision, Values

Mission

ILOTA is a multifaceted organization committed to promoting and advocating for the occupational therapy profession and supporting practitioners and students in the pursuit of quality and ethical services in Illinois.

Vision

ILOTA is the premier occupational therapy resource in Illinois.

Values

Be Dynamic

We serve as a catalyst for promoting health, well-being, and participation in an ever-evolving society. Through forward thinking we embrace change and innovation.

Be Inclusive

We welcome and celebrate all individuals in all that we do.

Be Dedicated

We are active and collaborative participants in the advancement of occupational therapy. We are self-motivated people who are passionate about the occupational therapy profession.

Be Ethical

We adhere to ethical standards in all of our efforts. It is critical that we demonstrate integrity and are viewed as trustworthy.

Implementation Plan

#	Focus Area	Initiative Name	Owner	Support (resources)	Timeline	Estimated Duration*	Level of Effort (L, M, H)
1	Advocacy	1.1 Recruit and train a lobbyist 1.2 Continue support of OT practice Act & Administrative rules 1.3 Schedule meetings once a quarter with legislators	<ul style="list-style-type: none"> Director of Advocacy 	<ul style="list-style-type: none"> Financial Time for training Task force of volunteers SIS committee 	<ul style="list-style-type: none"> By summer 2025 1 year Depends on legislation issues 	<ul style="list-style-type: none"> 1 year Ongoing Ongoing 	<ul style="list-style-type: none"> H M H
2	Membership	2.1 Annual membership survey 2.2 Resurrect student liaison committee by June 2025 2.3 Identify opportunities to engage students and new practitioners to become members	<ul style="list-style-type: none"> Director of membership 	<ul style="list-style-type: none"> ED Members Financial incentives for completion Academic community Student committee Director of communication Social media Job opportunities OT/OTA local programs 	<ul style="list-style-type: none"> Once a year, implement in April/May Analyze by June budget planning Fiscal year x/year 	<ul style="list-style-type: none"> 1 year Ongoing Ongoing 	<ul style="list-style-type: none"> M M M
3	Education	3.1 Co-chair conference structure with VP & staggering terms to ensure transition 3.2 Provide consistently 10-12 educational opportunities per year across state 3.3 Enhance functionality of LMS for virtual course offerings	<ul style="list-style-type: none"> Director of Finance ED EU coordinator 	<ul style="list-style-type: none"> Explore external event company Volunteers CE coordinator Course presenters Facilities Method of courses (online, live) Director of communication Volunteer support 	<ul style="list-style-type: none"> By January 2025 Fiscal year End of August 2025 	<ul style="list-style-type: none"> TBD Ongoing 3 months 	<ul style="list-style-type: none"> H H H
4	Governance	4.1 Create a succession plan 4.2 Evaluate and revise by-laws & organizational chart of executive and full board 4.3 Set up a task force of 2-3 board members to reassess and recommend SIS restructure	<ul style="list-style-type: none"> President Director of membership 	<ul style="list-style-type: none"> Executive Board ED (to create SOPs) Current org chart Bylaws committee Task force Revised bylaws Members feedback SIS chair 	<ul style="list-style-type: none"> Summer 2025 1 year Fiscal year 	<ul style="list-style-type: none"> 1 year 6 months 1-2 years 	<ul style="list-style-type: none"> H H H
5	Finance	5.1 Re-evaluate fiscal year 5.2 Create sustainable financial plan by analyzing trends and creating goals 5.3 Create an investment policy to protect financial assets of ILOTA	<ul style="list-style-type: none"> Director of finance Finance committee 	<ul style="list-style-type: none"> Executive Board Accountants Online resources ED Bylaws committee 	<ul style="list-style-type: none"> By summer 2025 Fiscal year 1 year 	<ul style="list-style-type: none"> 1 year Ongoing 6 months 	<ul style="list-style-type: none"> H H M

2024

2025

2026

2027

2027

Advocacy

1.1 Recruit and train a lobbyist

1.2 support of OT practice Act & Administrative rules

1.3 Schedule meetings once a quarter with legislators

2.1 Annual membership survey

2.2 Resurrect student liaison committee by June 2025

2.3 Identify opportunities to engage students and new practitioners to become members

3.1 Co-chair conference structure with VP & staggering terms to ensure transition

3.2 Provide consistently 10-12 educational opportunities per year across state

3.3 Enhance functionality of LMS for virtual course offerings

4.1 Create a succession plan

4.2 Evaluate and revise by-laws & org chart of executive and full board

4.3 Set up a task force of 2-3 board members to reassess and recommend SIS restructure

5.1 Re-evaluate fiscal year

5.2 Create sustainable financial plan by analyzing trends and creating goals

5.3 Create an investment policy to protect financial assets of ILOTA

Membership

2024 Strategic Planning

Education

Governance

Finance

2023 - 2024 Highlights

- Beginning 1st year of second term
- Attended the Affiliation State Association Presidents (ASAP) Meeting at AOTA in Florida virtually in April 2024 with George Buckley
- Strategic Plan
- Work with Director of Advocacy & Advocacy Committee
- CE courses (Director of Finance Report)
- Conference Committee
- Communication with the IL Licensure Board



Moving Forward

- Strategic Plan 2024-27
 - Focus Areas - development of committees
 - Advocacy efforts/committees/volunteers
 - Student Committee
 - Organizational structures



Director of Finance Report

Dalmina Arias



23-24 FY Closed Budget

Financials September 2023 to August 2024				
Income	FY 23-24 Actual	FY 23-24 Budget	Difference	FY 22-23 Actual
Membership	\$123,428.00	\$80,000.00	\$43,428.00	\$78,259.00
CE	\$60,776.00	\$38,000.00	\$22,776.00	\$56,727.00
Conference	\$74,492.00	\$65,000.00	\$9,492.00	\$59,605.00
Other	\$11,138.64	\$10,750.00	\$388.64	\$10,613.28
Total	\$269,834.64	\$193,750.00	\$76,084.64	\$205,204.28
Expenses	FY 23-24 Actual	FY 23-24 Budget	Difference	FY 22-23 Actual
Operating	\$117,562.34	\$136,987.88	-\$19,425.54	\$117,898.09
Direct Costs	\$57,617.65	\$56,500.00	\$1,117.65	\$52,541.01
Total	\$175,179.99	\$193,487.88	-\$18,307.89	\$170,439.10
Net Income	\$94,654.65	\$262.12	\$94,392.53	\$34,765.18



23-24 FY Budget Review

Income	Expenses
\$269,834.64 (31.5 % increase YoY)	\$175,179.99 (2.8% increase YoY)
<ul style="list-style-type: none">● Increase in CE workshops● Increase in membership● Successful annual conference	<ul style="list-style-type: none">● Increase in CE expenses due to hosting more events and events with greater expenses (e.g., orthotics)● Increase in operational expenses to support organization growth



Current Monetary Assets

Checking: \$179,655.93

Debit: \$7,275.26

5-year CD: \$5,291.93

Money Market: \$80,247.39

Total: \$272,470.51

As of 11/10/24 at 1830





CE Course - FY 2023-2024

- Thirteen courses
- 2 modalities
- 4 State requirements - Dementia Training, Implicit Bias, Sexual Harassment and Ethics

Director of Advocacy Report

Brenda Koverman



Advocacy Actions

- Reviewed advocacy needs and hired new lobbyist
- Attended IDFPR “On The Road” events met with Legislators to discuss licensing delays
- Met with legislators to discuss compact and OT’s role in mental health



Current Initiatives

- Amend Practice Act Referral Language
- Assess Compact Act potential
- Monitor and support MH loan forgiveness legislation
- Review and Revise EI Supervision Language
- Monitor and support Medicaid 1115 Waivers
- Participate in Tri Alliance focusing on transportation



Inclusion and Diversity

Volunteers and leaders participated in various committees



Lobbyist Report

Brian Wojcicki





Maureen Mulhall

Introduction

- Brian Wojcicki, President & CEO
- Illinois Capitol Group
- From Springfield, started legal practice in Chicago
- 20 years in IL government relations, focus on associations and professional licensure
- 15 years of legal practice, specializing in regulatory compliance & election law



Director of Communications Report

Lauren Stone Kelly



ILOTA's Newsletter:

- Accepting submissions - **deadline November 15th**
- Newsletter Coordinator - Erin Luy
- Co-coordinator position & committee positions open
- One more issue this year, and return to 4/year in Jan.

ILOTA's Website

- New Website Coordinator - Jenn Kang Lim
- Will orient with George and collab with President and EB to determine future needs/plans



ILOTA's Blog: *In the Now*

- Blog Coordinator: **still needed** email communications@ilota.org if interested
- Submissions are welcome - may have a few coming in by EOY -email communications@ilota.org



ILOTA's Social Media



- Facebook, Instagram, (@ilota1918)
- Twitter is not active - with changes to X not a productive interactive medium Working to create a social media email to standardize our processes and make succession easier and more sustainable
- Submissions are welcome - working on standardized process for submitting requests. Collaborating with Networking Coordinator, Social Media Coordinator, and student from Midwestern. Future collab with Membership
- Social Media Coordinator: Taylor Lerman- Thank you! Stephanie Reichard incoming in February



Director of Membership Report

Luther King membership@ILOTA.org



Current Membership

- **November 12, 2024**
 - **1536 members**
- High in 2024 - over 1800 members
- November 1, 2023
 - 1534 members
- November 10, 2022
 - 1138 members

2023 Membership Survey Completed



Current Membership Numbers

Category	November 10, 2024
Admin	3
Associate	3
Honorary Lifetime	7
Multistate	30
OT New Practitioner	122
OTA New Practitioner	28
OTA	97
OTA monthly	23
OT	695
OT Monthly	94
Retiree	16
Student	419
TOTAL	1537
Difference (from 10/18/23)	3



Latest Membership Categories

- Associate Member
 - Great for employers or OT advocates who are not OT practitioners or students
- New OT/OTA practitioners
 - 50% discount on member dues for first two years after graduation



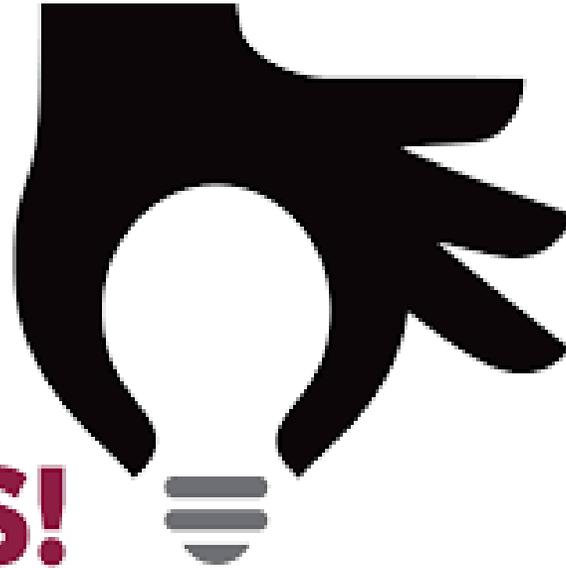
Member Benefits

- Free & Discounted Continuing Education
- Access to Information
- Networking
- Communique
- Professional Development Opportunities
- Member Only Discounts
- Special Interest Sections



Your Membership Matters

**TELL
US
YOUR
IDEAS!**



Secretary Report

Samantha Smith



Meetings of Executive Board Held*:

- January 20, 2024
- April 20, 2024
- June 15, 2024
- July 20, 2024
- September 21, 2024
- October 19, 2024

* Minutes posted on the ILOTA Website



Meetings of the Full Board Held*:

- February 17, 2024
- May 18, 2024
- August 17, 2024

*Minutes Posted on the ILOTA Website



Illinois Representative

AOTA Representative Assembly

Contact Info: lisaotr84@gmail.com

Request for Action (RAF)

https://forms.aota.org/forms/request_for_board_representative_assembly_action

Lisa Mahaffey





Illinois
Occupational
Therapy
Political
Action
Committee

Illinois Occupational Therapy Political Action Committee (ILOTPAC)

Laura VanPuymbrouck, Committee Chair

Executive Committee



Laura VanPuymbrouck
Chairperson

Thank you, Lisa Mahaffey for your service!



Illinois
**Occupational
Therapy
Political
Action
Committee**



Susan Charnley
Secretary



Kaitlin
Peters
Treasurer



Nosifat Sokoya
Member at Large



Candace Adesko
Member at Large

**Incoming Member
at Large
&
Student Member**

Legislators Supported

Senate President Don Harmon (D)

Senator Karina Villa (D)

Senator Meg Loughran Cappell (D)

Senator Suzy Glowiak Hilton (D)

Rep. Dagmara Avelar (D)

Rep. Lindsay LaPointe (D)

Rep. Robyn Gabel (D)

Rep Maurice West (D)

Rep. Anna Moeller (D)



Events Attended



PAC Palates!



ILOTPAC



Illinois Occupational Therapy Political Action Committee



Instagram: @ilotpac



(Twitter): @ilotpack



Remember the ILOTPAC!

If you are an ILOTA member, PLEASE
consider a donation.

www.ilota.org/ilotpac

Or scan the QR code to go directly to
the donation page.



***Also if I reach out to you because we plan
to support your rep, consider joining us!





Awards & Recognition Ceremony - at Conference
November 22!





See you all at Conference, Friday, November 22 & Saturday November 23,2024!
Sign-up to volunteer at Conference!!
NIU Conference Center, Naperville IL

Comments and question