



**ILLINOIS OCCUPATIONAL THERAPY ASSOCIATION
FULL BOARD MEETING MINUTES
February 25, 2026 Location: Zoom Meeting**

Members Present	Members Absent
<p>Beverly Menninger – President Laura Mraz – President-Elect Lauren Stone Kelly – Director of Communications Luther King – Director of Membership Samantha Smith – Secretary Pooja Patel – Director of Advocacy Sarah Mugavero – Director of Finance George Buckley - Executive Director Hannah Kaytonah - Nominations Coordinator Jacqueline Becker – Board Recruitment Coordinator Sarah Zera - CE Coordinator Jennifer Richert – CE Approval Co-Coordinator Nancy Richman – Reimbursement Coordinator Gail Fisher – Awards Coordinator Jennifer Summers - Networking Coordinator Erin Luy – Newsletter Coordinator Phyllis Hughes - Fieldwork Coordinator John Dudzik – Leadership Development Committee Chair Brian Wojcicki -- Lobbyist Ashley Stoffel – Archives Co-Coordinator</p>	<p>Laura Carlos - Orthopedic & Upper Extremity Rehab SIS Co-Coordinator Cassandra Jackson – Bylaws Coordinator Lisa Mahaffey – AOTA Representative Kathy Preissner – Archives Co-Coordinator Kate Barrett – CE Approval Co-Coordinator Stephanie McCammon – Conference Co-Coordinator Kiah Atkinson – Student Conclave Co-Coordinator Emily Harstad– Student Conclave Co-Coordinator Emma Penn - Public Policy Coordinator La’Taria Overstreet – Professional Development Coordinator Jen Lim – Website Coordinator Katie Little – Blog Coordinator Bridget Hahn - Community Outreach Coordinator Piper Hansen – Academic Education SIS Co-Coordinator Ryan Thomure – Academic Education SIS Co-Coordinator Frank Czuba– Administration and Management SIS Co-Coordinator Joy Hyzny – Assistive Technology SIS Co-Coordinator Kathleen Ellis – Assistive Technology SIS Co-Coordinator Emily Daniels – OTA SIS Co-Coordinator Rita Moore – Developmental Disabilities SIS Coordinator Monika Robinson – Home and Community Health SIS Co-Coordinator Maddy Nave - Mental Health SIS Co-Coordinator Ryan Thomure – Mental Health SIS Co-Coordinator Alexandra Wax – Neurorehabilitation SIS Co-Coordinator Katie Fierstein – Neurorehabilitation SIS Co-Coordinator</p>
<p>SIS Coordinators: Nancy Richman - Administration and Management SIS Co-Coordinator Ruby Loera – OTA SIS Co-Coordinator Lillian Chen-Byerley – JEDI SIS Coordinator Clare Giuffrida – Early Intervention SIS Co-Coordinator Alison Hanlon – Early Intervention SIS Co-Coordinator</p>	

<p>Pooja Patel – Gerontology SIS Coordinator Ruby Loera – Home and Community Health SIS Co-Coordinator Maud Makoni – Conference Co-Coordinator + Orthopedic & Upper Extremity Rehab SIS Co-Coordinator Lara Barros – School-Based Practice SIS Co-Coordinator Michelle Van Acker – School-Based Practice SIS Co-Coordinator Kyra Barillier - Sensory Integration and Processing SIS Co-Coordinator</p>	<p>Alison Baker – Pediatrics SIS Co-Coordinator Ashley Hettlinger – Pediatrics SIS Co-Coordinator Samantha Holzschu – Sensory Integration and Processing SIS Co-Coordinator Kate Kloster – Social Media Coordinator</p>
<p>Guests: Theresa Christopher – UE SIS Representative</p>	

Topic	Notes	Action Items & Person Responsible
Call to Order	Beverly called the meeting to order at 6:32pm.	
Roll Call	See members/guests present above.	
Approval of Minutes	Motion to approve the August 16, 2025 ILOTA Full Board Meeting Minutes (See attached). Clare seconds. MOTION CARRIED. (MOTION 2026-02-01)	
President's Report: Beverly Menninger	<ul style="list-style-type: none"> Governance Task Force update – looking at position descriptions of executive board and full board. Will be soliciting feedback on clarity related to various positions. Breakfast with the Scholars – 7AM breakfast on Friday AOTF, 4 tickets at AOTA, 2 have been claimed and have 2 additional tickets. E-mail George if you are interested, if multiple people will do a drawing. 	
Advocacy and Legislative Affairs: Pooja Patel	<p>Current Initiatives:</p> <ol style="list-style-type: none"> Filed Legislative Support/Actions: 	Alison + Clare to send Jen Summers and Pooja information about time/date for

	<p>a) HB3769: OT Practice Act – updating language related to referrals & direct access. Referrals bill passed in the House and still needs to go through the Senate.</p> <p>b) SB1273: Community Behavioral Health Care Professional Loan Repayment Act – adding OTPs as eligible professionals (education budget appropriations bill)</p> <p>c) HB05171/SB03807: Licensed Behavioral Analyst Act – adds OTPs to list of exemptions and allows for multidisciplinary OT/ABA practice ownership (see also: SB3905 – <i>awaiting amendments</i>)</p> <p>d) HB4976: OT Licensure Compact Act</p> <p>e) SJR 0048: Professional Degrees (joint senate resolution calling for legislation to include allied health degrees as professional degrees, includes OT)</p> <p>2. Monitoring:</p> <p>a) Above bills</p> <p>b) IDEC Launch & Rollout July 2026 – Rule 500 & Reimbursement Rates = two key high-level EI OT issues</p> <p>3. Capstone Student:</p> <p>a) Focus: improving member engagement in population-level advocacy issues – holding a virtual webinar on “From Practice to Policy”</p> <p>4. Outreach:</p> <p>a) Advocacy presentations for schools and downstate outreach initiative/collab with Director of Membership both ongoing</p> <p>b) Social Media Campaign – collaborating with capstone student and comms team</p> <p>Agenda items for review:</p> <ol style="list-style-type: none"> 1. Website – updated landing page for consolidated updates 2. Advocacy SOPs for SISs – plan to follow procedure to have reviewed/approved by the executive board. 	<p>upcoming EI SIS meeting (March 20th). February minutes available on the Google Drive.</p>
<p>Director of Communications Report: Lauren Stone Kelly</p>	<ul style="list-style-type: none"> • Newsletter – in editing phases, will be published in March. Deadlines for submissions for next issue will be May 1st • Blog – new blog post up soon! Send your submissions to ilotablog@gmail.com • Website – continuing audit; slow process, but we’re moving. Some individuals volunteered to assist with the website committee. 	

	<ul style="list-style-type: none"> • Social Media – Stephanie Reichard is transitioning away from the coordinator position this month and training Kate Kloster as our new social media coordinator. Welcome Kate! 	
Director of Finance Report: Sarah Mugavero	<p>3) Financial Update</p> <p><u>Account Balances as of 2/18/26 3:15 PM:</u></p> <ul style="list-style-type: none"> ○ Checking: \$230,560.83 ○ Debit: \$4,203.14 ○ CD: \$50,000 (3.405%) ○ Money Market: \$82,997.91 (2.175%) ○ Total: \$367,761.88 <p>2) Investment Policy Task Force – still needs to meet, tentative plan for this spring to discuss how to manage finances</p> <p>3) Student Conclave: 3/21/26 at Midwestern University – in-person event, various presentations/breakout sessions, 3 sponsors, setting up a group discount for students to attend.</p>	
Director of Membership Report: Luther King	<p>Membership report:</p> <ol style="list-style-type: none"> 1. The membership survey will be coming out in March. – plan to have the executive board to review the survey before sending out. 2. Planning various engagement activities throughout the year. 	

	BI	BJ	BK	BL
Category	December 9, 2025	January 16, 2026	February 24, 2026	
Admin		3	3	3
Associate		11	11	11
Honorary Lifetime		8	8	8
Multistate		37	47	46
OT New Practition		167	172	172
OTA New Practitic		29	32	33
OTA		135	157	156
OTA monthly		36	47	44
OT		1006	1064	1088
OT Monthly		134	155	142
Retiree		20	22	22
Student		477	490	490
TOTAL		2063	2238	2215
		301	175	-23

Updates from SIS Coordinators and Committee Coordinators

Sarah Zera – CE Committee

- The student CE event policy we created over the past year worked well this year.
- We are developing a proposal to increase speakers fees
- We are developing a marketing strategy.
- Working with speakers for courses required licensure renewal for 2027

We have lots of courses coming up!
 3/5/26: How I Built This - ILOTA Entrepreneurship Series: Session 1 - Mobile Occupational Therapy

3/12/26: From Practice to Policy: Practical Advocacy Strategies for Illinois OTPs
3/26/26: Winning the Arms Race: Optimizing Upper Extremity Amputations & Advancements in Prosthetic Technology
3/28/26: Toileting Challenges in Pediatric Practice
3/28/26: Getting Hands-On with Vision: Learning the Key Components of Vision Assessment and Intervention
4/9/26: From Clinic to Classroom: Launching Your Academic Career in Occupational Therapy
4/16/26: Occupational Therapy Interventions to Support Sleep in Babies and Toddlers
5/6/26: CVI Strategies for the OT Practitioner in the School Setting

- April 18 Modalities Course – information available on the website
- Reviewed student CE policy
- Discuss option for free courses offered to members

Bridget Hahn – Community Outreach Coordinator

Updates:

- **WFOT Presentation**– The committee presentation (attached) was well received by our audience (~30 attendees?). We even made an Australian connection!
- **Mentoring Committee:** 105 mentees!
 - **Action Items:** We need more mentors. **Please consider being a mentor yourself or forwarding on!** Details in the email attached.
- **Connections in the Community: Promote OT Challenge**
 - 67 participants signed up
 - 13 have completed visits
 - Lincoln Land Community College: 6
 - Rush University: 4
 - McHenry County College: 1
 - Parkland College: 1
- **Prizes** Currently: 2 ILOTA Conference registrations

- I will contact AOTA & NBCOT for swag donations
→ **Any additional prize ideas?**

Laura Carlos + Theresa Christopher – Orthopedic & Upper Extremity Rehab SIS

- Our next speaker surgeon series event will be on March 26th at 6:30pm
- Hand Therapy week (first week of June) , please be on the look out for updates.
- Planning for our annual Summer Shaumburg Boomer’s Fundraiser, dates TBD

Lillian Chen-Byerley – JEDI SIS Coordinator

Thank you for recognizing the value of DEI within the ILOTA to be an integral part of our profession as we advocate justice and equality to ensure all people have the right to perform in daily occupations regardless of societal and environmental barriers In keeping with the mission of OT to enable all people regardless of age, to participate or perform meaningful ADLs to promote health, independence and wellbeing. Recognizing and acknowledging the value how DEI is a vital part of our practice, and as practitioners it is as valuable as ethical behavior and part of our character.

- JEDI Committee being removed from SIS category and put into a different category, thankful for this change. Changes with the election, decreased interest in DEI with risk of losing funding. Updating information on the website. Encouraging organization to be a forward example related to DEI.
- Clare Giuffrida – policy related to CE credits that are EI approved at conference. Multiple ways to obtain credit in the past. Conference courses did not get EI credit. Determine someone on conference committee who could be knowledgeable about the EI content. In the proposal could ask, “Is this appropriate to be approved for EI?”
- Gail Fisher – The awards committee will be starting to plan for the next round of nominations and awards for the fall conference. If anyone has suggestions about our nomination or award process, let me know. gailsfisher@gmail.com. The AOTA Education Summit is Nov 13 and 14 in Indianapolis.
- ILOTA Conference dates in Nov 20-21, 2026 potentially at NIU.

Sarah Zera to provide steps to the conference committee for EI CE credit.

	<ul style="list-style-type: none"> • 2030 AOTA Inspire Conference in Chicago • Nancy Richman – ILOTA involvement is dependent on who is coordinating AOTA 	
Secretary Report: Samantha Smith	You may reference past minutes posted on the ILOTA website. Thank you for sending your updates and agenda items, please continue to submit to me prior to meetings so that I am able to send out the Agenda in a timely manner for everyone's review.	
Upcoming Meeting	ILOTA Full Board Meeting – May TBD; Beverly to discuss upcoming opportunity for in-person/hybrid meeting	
Other Business		
Adjournment	Motion to adjourn the meeting was made by Bev. Gail seconds. MOTION CARRIED. (MOTION 2026-02-02) Adjourned at 8:02PM.	

Minutes prepared by Samantha Smith, ILOTA Secretary.