

OREGON BOARD OF PHYSICAL THERAPY

BOARD MEETING AGENDA

July 21, 2023 8:30 AM - until end of business

Meeting by web-conference

Members of the public may attend this meeting remotely by registering via the link posted on our website at: <https://www.oregon.gov/pt/Pages/meetings.aspx>

I Call to Order -- Public Session

A Board Motions - Board actions as result of Executive Session.

B Consent Agenda Items – *These items are being presented as a consent agenda; the Board members review the consent agenda items ahead of the meeting and will adopt the items as a single motion unless specific items are flagged for discussion and/or individual motion.*

- 1 Board Meeting Minutes, Draft—May 19, 2023.
- 2 Ratification of PT/PTA Licenses & Temp Permits issued May 1st, 2023 – June 30th, 2023.
- 3 Executive Director’s Report for July 2023.
- 4 Summary Report: Developing Culturally Responsive Regulation.

C Public Comments

The Board welcomes public comments. At this point in the meeting, the Board Chair will ask if anyone attending would like to make comment—speakers will be asked to identify themselves for the record when speaking.

D Board Member/Committee/Delegate Reports

- 1 PT Compact Commission and FSBPT Delegate Updates
- 2 Strategic Plan Progress Review
- 3 Open Roundtable

E Board General Discussion & Action Items

- 1 **Review of Delegated Authority**—*License Application Approval Policy.*
- 2 **2023 Legislative Session Update** —*Staff will provide final update on 2023 tracked bills.*
- 3 **Board Annual Best Practices Review**—*The Board will complete annual review of best practices and performance.*
- 4 **General Discussion**—*Those in attendance will report on content from FSBPT Leadership Issues Forum and Model Practice Act Workshop and Board will discuss topics and any possible next steps.*

F Other Business

II Adjournment

This proposed agenda subject to last minute changes without prior notice. A request for an interpreter or other accommodations for persons with disabilities should be made at least 48 hours before the meeting to 971-673-0200 or physical.therapy@oregon.gov

Oregon Board of Physical Therapy
Board Meeting Minutes - DRAFT
Friday, May 19, 2023

Board Members Present: Phil Haworth, PT, Chair; Erica Shanahan, PTA, Vice Chair; Sandra Hahn; Hoku Okumura, PT; Becca Reisch, PT; Michael Rennick, PT; Susan Reynolds, PT.

Board Members Absent: None (one position vacant).

Staff: Michelle Sigmund-Gaines, Executive Director; Sherri Paru, PT, Clinical Advisor/Investigator, Sarah Casey, Operations and Policy Analyst.

Staff Absent: Gayla Goodwin, Licensing Coordinator (excused).

Legal Counsel: Angie Hunt, AAG.

PUBLIC (OPEN) SESSION

Chair Haworth convened the Board into Public Session at 9:12 AM for the purpose of roll call. No members of the public were present.

EXECUTIVE (CLOSED) SESSION

After roll call, the meeting was convened into Executive Session at 9:13 AM pursuant to ORS 192.660(2)(f) and ORS 192.660(2)(L).

At 11:26 AM, Chair Haworth adjourned Executive Session.

PUBLIC (OPEN) SESSION

Chair Haworth convened the Board into Public Session at 12:32 PM.

Board Members Present: Phil Haworth, PT, Chair; Erica Shanahan, PTA, Vice Chair; Sandra Hahn; Hoku Okumura, PT; Becca Reisch, PT; Michael Rennick, PT; Susan Reynolds, PT.

Board Members Absent: None (one position vacant).

Staff: Michelle Sigmund-Gaines, Executive Director; Sherri Paru, PT, Clinical Advisor/Investigator, Sarah Casey, Operations and Policy Analyst.

Staff Absent: Gayla Goodwin, Licensing Coordinator (excused).

Legal Counsel: Angie Hunt, AAG.

Members of the Public Present: Ruggie Canizares, PT, Noel Tenoso, PT, Erin Crawford, PT, James Heider. Diana Godwin.

A- Board Motions:

Case PT 797-02/23

Motion by Member Shanahan to close case.

Motion seconded by Member Okumura.

Motion passed unanimously by a vote of 7-0.

Case PT 800-03/23

Motion by Member Shanahan of finding of sufficient evidence of violation of ORS 688.140(2)(a) and OAR 848-045-0020(2)(s).
Motion seconded by Member Okumura.
Motion passed unanimously by a vote of 7-0.

Case PT 805-05/23

Motion by Member Shanahan to close case and issue license.
Motion seconded by Member Okumura.
Motion passed unanimously by a vote of 7-0.

Case PT 806-05/23

Motion by Member Shanahan to close case.
Motion seconded by Member Okumura.
Motion passed unanimously by a vote of 7-0.

Case PT 808-05/23

Motion by Member Shanahan to close case and issue license.
Motion seconded by Member Okumura.
Motion passed unanimously by a vote of 7-0.

In Cases PT 803-03/23 and PT 804-04/23

Motion by Member Shanahan to ratify the administrative closure of these cases pursuant to delegated authority.
Motion seconded by Member Okumura.
Motion passed unanimously by a vote of 7-0.

B- Consent Agenda Items

The following items were presented as a consent agenda. Board members reviewed the items prior to the meeting.

- 1 Board Meeting Minutes, Draft—March 15/17, 2023.
- 2 Ratification of PT/PTA Licenses & Temp Permits issued March 1, 2023 – April 30, 2023.
- 3 Executive Director’s Report for May 2023.
- 4 Final 23-25 Affirmative Action Plan.
- 5 EO 23-03 Agency Response.

Member Shanahan moved to approve the consent agenda items as written. Member Okumura seconded the motion. Motion passed unanimously by a vote of 7-0.

The Board proceeded to consider remaining agenda items in a different order than listed on the agenda, to accommodate different presenters.

General Discussion, Action Items & Reports

E3-Rulemaking relating to OAR 848-005-0010

Director Sigmund-Gaines shared that no public comment was received on the proposed amendment, which would adopt the 23-25 Biennium Budget. Member Shanahan moved to

adopt the proposed amendment relating to OAR 848-005-0010 as written to be effective July 1, 2023. Member Okumura seconded the motion. Motion passed unanimously by a vote of 7-0.

D3-Board Officers & FSBPT Delegates Elections

Director Sigmund-Gaines presented the slate of candidates. For Chair, Member Shanahan. For Vice Chair, Member Okumura. For FSBPT Delegate, Member Shanahan. For FSBPT Alternate Delegate, Member Rennick. Since all candidates were unopposed, the Board could consider a motion to approve the slate of candidates as one motion. Member Shanahan so moved, to be effective June 1, 2023. Member Okumura seconded. Motion passed unanimously by a vote of 7-0.

D2-Introduction of New Members

Chair Haworth noted that the Governor has appointed, pending Senate confirmation, two new members to the Board. Erin Crawford, PT has been appointed to fill the position currently filled by Phil Haworth. If confirmed by the Senate, her term would begin July 1st. Dwight Terry has been appointed to the open public member position. He is slated to appear before the Senate in September, and would begin his term, if confirmed, after that.

D4-FSBPT Delegate Report and PT Compact Commission Report

Chair Haworth noted that the annual FSBPT Leadership Issues Forum (LIF) is coming up in July, and that he would be attending as a member of the resolutions committee. Director Sigmund-Gaines and Member Shanahan, as FSBPT Delegate, will also be attending. Both Shanahan and Sigmund-Gaines will also be attending an all-day workshop on the Model Practice Act held the Monday after the LIF meeting. A representative from APTA-OR will also be attending. Chair Haworth also noted that Director Sigmund-Gaines has been slated as a candidate for the FSBPT Board of Directors, for the board administrator position. Haworth also reminded folks to share any requests or ideas for webinar or educational session topics.

Director Sigmund-Gaines, as PTCC Delegate, noted that Indiana is now the 29th state issuing privileges. The PTCC is also actively involved in the rulemaking process. If adopted by the PTCC, the Board would then need to review and initiate Oregon administrative rulemaking to adopt the most recent version of the PTCC rules.

D6-Roundtable

Public Service Ambassador Recognition: Sherri Paru

Director Sigmund-Gaines announced that Sherri Paru was selected as one of Oregon's 2023 Public Service Ambassadors.

Recognition of Service: Member Haworth

The Board Members and Staff then recognized Member Haworth for his eight years of service as a Board Member, Chair, and FSBPT Delegate. Chair Haworth shared his appreciation of the Board, and the collective efforts and accomplishments made during his tenure.

D5-Strategic Planning Process Review

Director Sigmund-Gaines presented materials highlighting progress on the Board's strategic planning initiatives. The materials have been cross-referenced to [the State of Oregon's statewide Diversity, Equity and Inclusion Plan](#) to show how the Board's current initiatives map to the statewide plan.

Note: Member Reisch left the meeting at 1:04 PM.

E1-Presentation: Pacific University Elementary Outreach Project 2023: Kim, Malin, PT

Kim Malin, PT, a member of the Educational Pathway Workgroup, provided a presentation on a pilot program on [elementary school outreach program](#) she conducted with her PT students.

Malin shared materials developed by the students used at the event and shared her observations and learnings about the event. Malin also noted that she plans to repeat the event and is working on ways to expand the program to other schools, as well as encourage others to initiate similar events. Malin commented that working with the Educational Pathway Workgroup has been valuable because it brings together individuals from across the state with different experiences and with interest in different pieces of the overall project. The Board thanked her and her students for their work, and encouraged the extension of, and outreach about, their work.

E4- Rule Clarification and Change Requests

Presentation: Rule Change Request for OAR 848-040-0155: Deidre Nixon, PT, Medford Children's Therapy

Deidre Nixon, PT presented background context relating to a request for the Board to consider a change to OAR 848-040-0155 relating to reassessment. Nixon described the difficulty of hiring sufficient PT personnel and the impact on her non-profit clinic pediatric outpatient clinic with 60-70% of patients utilizing Medicaid. They do make use of PTA staff, but the current 30-day reassessment requirement is challenging in part because of the elapsed time often seen in the scheduling of patients; patients often are scheduled every other week, meaning reassessments are being required nearly every other visit. The workload managing reassessments with potentially low benefit given the current elapsed time requirement irrespective of treatment visit frequency is impacting their ability to provide sufficient service in their area for these populations. Nixon requested consideration of adopting the 60 day limit similar to what is in rule for school-based practice, or other mechanism for determining timing for a reassessment.

The Board requested staff research practices in other states related to reassessment requirements. After a short break, the Board then heard information on a second request:

Rule Change Request for OAR 848-040-0170

Staff related a request to change the requirement for discharge record requirements in outpatient setting to allow last entry to serve as discharge record for inactive patient or patients who have not returned for further treatment within 30 days. Per the requester (a licensee), they felt discharge notes made in such cases do not contain any pertinent clinical information; therefore, it seems that the note from the last treatment visit would be sufficient as to the last known status of the patient. The requester believes eliminating this requirement will save therapists time on tasks with little to no clinical benefit. One option may be to utilize a standard treatment note containing a statement such as "If the patient does not return for further treatment beyond 30 days, this note will serve as the discharge note." *** or if patient self-discharges from treatment prior to goals being met.

After discussion about both requests, Member Shanahan made a motion to form a rule advisory committee to review past rulemaking, other jurisdictional practice and make recommendations on any changes to OAR 848-040-0170 and OAR 848-040-0155. Member Okumura seconded.

Motion passed unanimously by a vote of 6-0.

E2-Report to Board: Rule Advisory Committee on Rules Related to Applicants Who Are Graduates of non-CAPTE Accredited Programs

Staff member Sarah Casey presented on the work of the rule advisory committee formed to evaluate and make recommendations relating to board rules pertaining to applicants who are graduates of non-CAPTE accredited programs. The presentation included detail about the committee members, meetings held, and flow charts showing both the current licensure pathways, as well as the recommended rule changes and resulting changes to the flow charts. After discussion, the Board expressed their appreciation for the work of the committee thus far, and also wanted some additional research to be completed. Member Shanahan then moved to request the committee do further research on clinical practice requirements and bring forward that research and recommendations for possible rule changes. Member Okumura seconded. The motion passed 6-0.

C--Public Comments:

Jim Heider, as former Executive Director, provided a comment related to the prior rule advisory committee recommendations related to clinical practice currently in rule for endorsement candidates. The requirement was created to address candidates that apply who have no experience working in the US Healthcare system. He also requested the Board, in considering any clinical practice requirement, consider both the equity and administrative workload aspects of any such requirement relative to the level of public protection achieved. Heider also commented on the value of the discussions and data presentations, and his appreciation for those being part of the public Board meetings.

Noel Tenoso, PT, shared his experience as a private practice small business owner, and his interest in the proposed rule amendments in part to support bringing additional candidates to Oregon to meet staffing needs, and shared an example of an individual currently working in Washington who is facing barriers in moving to and working in Oregon.

Ruggie Canizares, PT, commented on the importance of removing unnecessary barriers to licensure, especially with declines in healthcare workforce availability, but to do so through the lens of public protection. He also noted that creating parity between CAPTE and non-CAPTE graduate applicants, and so any consideration of clinical practice requirements should be viewed in context of return to practice or initial practice requirements for all. Finally, he noted that he entered the state via endorsement as a non-CAPTE accredited graduate long before the current rules existed and has had decades of successful practice.

Diana Godwin congratulated Phil on his eight years of service and noted that she found the meeting very instructive and interesting, particularly the rule change discussions related to discharge and reassessment, and volunteered to serve on any committees being formed.

E5-2023 Legislative Session Update

Director Sigmund-Gaines provided an updated document on bills being tracked. Some bills are currently in limbo pending establishing quorum in the Senate.

E6- Data Presentation: Complaint Categories Part II

Staff Casey presented follow up information regarding complaint investigations and trends, specifically analyzing ratio of action to no action taken by complaint category over time, which

included some reference to similar data for other boards and jurisdictions. Casey noted that data collection and presentation methods vary in our sampling, and additional analysis would need to be performed for direct comparisons. After discussion, the Board requested staff determine what, if any, national information would be available from the FSBPT or other source on complaint resolution trends. The Board also requested additional information related to discipline trends related individuals from non-CAPTE accredited programs. Casey noted that additional data entry and clean up would be required prior to effective analysis. Casey noted the next planned data presentation would focus on Oregon Compact Privilege trends.

F-Other Business

None

Meeting Adjourned at 3:45 PM.

Oregon Board of Physical Therapy

Ratification Report: New Licenses and Temporary Permits Issued 5/1/2023 - 6/30/2023

| License Number | First Name | Last Name | License Effective Date | License Method | License Status | License Type | Initial Registration Date |
|----------------|------------|-----------|------------------------|----------------|----------------|--------------|---------------------------|
| 10167 | Brittany | Fuller | 5/1/2023 | Endorsement | Active | PTA | 5/1/2023 |
| 64911 | Craighton | Carey | 5/1/2023 | Endorsement | Active | PT | 5/1/2023 |
| 64912 | Emilio | Aranda | 5/2/2023 | Endorsement | Active | PT | 5/2/2023 |
| 64913 | Jacob | Marino | 5/2/2023 | Endorsement | Active | PT | 5/2/2023 |
| 9328 | Hailey | Crawford | 5/2/2023 | Exam | Active | PTA | 7/13/2016 |
| 64917 | Connor | Perkins | 5/3/2023 | Exam | Active | PT | 5/3/2023 |
| 10168 | Kristan | Robinson | 5/3/2023 | Endorsement | Active | PTA | 5/3/2023 |
| 64915 | Allison | Stone | 5/3/2023 | Exam | Active | PT | 5/3/2023 |
| 64916 | Kevin | Ishitani | 5/3/2023 | Exam | Active | PT | 5/3/2023 |
| 64914 | Jacqueline | Vaneecke | 5/3/2023 | Endorsement | Active | PT | 5/3/2023 |
| 64919 | Jay-Paul | Thornburg | 5/3/2023 | Endorsement | Active | PT | 5/3/2023 |
| 64918 | Caroline | Epperson | 5/3/2023 | Exam | Active | PT | 5/3/2023 |
| 64920 | Elizabeth | Grove | 5/4/2023 | Exam | Active | PT | 5/4/2023 |
| 64923 | Everett | Nicolai | 5/8/2023 | Endorsement | Active | PT | 5/8/2023 |
| 64921 | Elizabeth | Casparian | 5/8/2023 | Endorsement | Active | PT | 5/8/2023 |
| 10169 | Neil | Langridge | 5/8/2023 | Endorsement | Active | PTA | 5/8/2023 |
| 64922 | Lexus | McAlister | 5/8/2023 | Exam | Active | PT | 5/8/2023 |
| 10170 | Brooke | Bechtold | 5/8/2023 | Endorsement | Active | PTA | 5/8/2023 |
| 64926 | Natalie | Zadeh | 5/9/2023 | Exam | Active | PT | 5/9/2023 |
| 64925 | Joseph | Bigsby | 5/9/2023 | Endorsement | Active | PT | 5/9/2023 |
| 64924 | Marie | Sakamoto | 5/9/2023 | Endorsement | Active | PT | 5/9/2023 |
| 10171 | Alanna | Maniatis | 5/9/2023 | Endorsement | Active | PTA | 5/9/2023 |
| 64929 | Alex | Johnston | 5/10/2023 | Exam | Active | PT | 5/10/2023 |
| 64928 | Samuel | Eccles | 5/10/2023 | Exam | Active | PT | 5/10/2023 |
| 64930 | Amy | Foley | 5/10/2023 | Endorsement | Active | PT | 5/10/2023 |
| 64927 | Angela | Valentine | 5/10/2023 | Endorsement | Active | PT | 5/10/2023 |
| 64932 | Hannah | Mattson | 5/15/2023 | Exam | Active | PT | 5/15/2023 |
| 64935 | Johnathan | Admiraal | 5/15/2023 | Endorsement | Active | PT | 5/15/2023 |
| 64934 | Melody | Hansen | 5/15/2023 | Exam | Active | PT | 5/15/2023 |
| 64933 | Connor | Herrmann | 5/15/2023 | Exam | Active | PT | 5/15/2023 |
| 64931 | Elizabeth | Geerdes | 5/15/2023 | Exam | Active | PT | 5/15/2023 |
| 4879 | Lisa | Saverus | 5/15/2023 | Endorsement | Active | PT | 10/27/2004 |
| 10172 | Brooke | Boyd | 5/15/2023 | Endorsement | Active | PTA | 5/15/2023 |
| 64150 | Ellen | Cox | 5/15/2023 | Endorsement | Active | PT | 6/9/2021 |
| 64937 | Zachary | Munizza | 5/16/2023 | Endorsement | Active | PT | 5/16/2023 |
| 64936 | Yilin | Diao | 5/16/2023 | Exam | Active | PT | 5/16/2023 |
| 64943 | Nancy | McCluskey | 5/17/2023 | Endorsement | Active | PT | 5/17/2023 |
| 64941 | Madeline | Robertson | 5/17/2023 | Exam | Active | PT | 5/17/2023 |
| 64939 | Mitchell | Bodiford | 5/17/2023 | Exam | Active | PT | 5/17/2023 |
| 64938 | Stephanie | Yanabu | 5/17/2023 | Endorsement | Active | PT | 5/17/2023 |
| 64942 | Kasey | Calwell | 5/17/2023 | Exam | Active | PT | 5/17/2023 |

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|----------------|-------------|-------------------|------------------------|----------------|------------------|--------------|---------------------------|
| 64940 | Emiko | Mar | 5/17/2023 | Exam | Active | PT | 5/17/2023 |
| 64944 | Colleen | Stitt | 5/17/2023 | Endorsement | Active | PT | 5/17/2023 |
| 64945 | Danielle | Villaruz | 5/17/2023 | Exam | Active | PT | 5/17/2023 |
| 64948 | Carly | Rosen | 5/22/2023 | Endorsement | Active | PT | 5/22/2023 |
| 64946 | Elmer | Faculo III | 5/22/2023 | Exam | Active | PT | 5/22/2023 |
| 64947 | Francisco | Sanchez Escamilla | 5/22/2023 | Exam | Active | PT | 5/22/2023 |
| 5288 | Gayle | Minnick | 5/22/2023 | Endorsement | Active | PT | 8/22/2006 |
| 64949 | Anthony | Lucas | 5/23/2023 | Exam | Temporary Permit | PT | 5/23/2023 |
| 64950 | Jordan | Barber | 5/23/2023 | Exam | Temporary Permit | PT | 5/23/2023 |
| 64958 | Kylie | Lange | 5/23/2023 | Exam | Active | PT | 5/23/2023 |
| 10173 | Katie | Brown | 5/23/2023 | Endorsement | Active | PTA | 5/23/2023 |
| 64952 | Kelsey | Huntington | 5/23/2023 | Exam | Active | PT | 5/23/2023 |
| 10174 | Caleb | Voss | 5/23/2023 | Endorsement | Active | PTA | 5/23/2023 |
| 64955 | Melody | Bryden | 5/23/2023 | Exam | Active | PT | 5/23/2023 |
| 64954 | Gavin | Boen | 5/23/2023 | Exam | Active | PT | 5/23/2023 |
| 64951 | Amy | Penner | 5/23/2023 | Exam | Active | PT | 5/23/2023 |
| 64956 | Kathleen | Hughes | 5/23/2023 | Exam | Active | PT | 5/23/2023 |
| 64957 | Kayla | Bomben | 5/23/2023 | Exam | Active | PT | 5/23/2023 |
| 64953 | Hunter | Warmack | 5/23/2023 | Exam | Active | PT | 5/23/2023 |
| 64962 | Kelly | Stevens | 5/24/2023 | Exam | Active | PT | 5/24/2023 |
| 64961 | Rebecca | Flores | 5/24/2023 | Exam | Active | PT | 5/24/2023 |
| 64959 | Taylor | Bussell | 5/24/2023 | Endorsement | Active | PT | 5/24/2023 |
| 1730 | Mary Eileen | Barr | 5/24/2023 | Endorsement | Active | PT | 4/13/1988 |
| 64960 | Tanner | Canaday | 5/24/2023 | Exam | Active | PT | 5/24/2023 |
| 64967 | Emily | Cullen | 5/25/2023 | Exam | Temporary Permit | PT | 5/25/2023 |
| 64969 | Marie Kylee | Seto | 5/25/2023 | Exam | Temporary Permit | PT | 5/25/2023 |
| 64964 | Mikaela | Bernards | 5/25/2023 | Exam | Temporary Permit | PT | 5/25/2023 |
| 64966 | Dylan | Carmody | 5/25/2023 | Exam | Active | PT | 5/25/2023 |
| 64965 | Erica | Bruce | 5/25/2023 | Exam | Active | PT | 5/25/2023 |
| 64963 | Kevin | Nguyen | 5/25/2023 | Endorsement | Active | PT | 5/25/2023 |
| 64970 | Taylor | Turner | 5/25/2023 | Exam | Active | PT | 5/25/2023 |
| 64968 | Brandon | Holmes | 5/25/2023 | Exam | Active | PT | 5/25/2023 |
| 64973 | Emily | Stein | 5/26/2023 | Endorsement | Active | PT | 5/26/2023 |
| 64975 | Tyler | Albrecht | 5/26/2023 | Endorsement | Active | PT | 5/26/2023 |
| 64976 | Patricia | Duffy | 5/26/2023 | Endorsement | Active | PT | 5/26/2023 |
| 64977 | Jillian | Schwartz | 5/26/2023 | Endorsement | Active | PT | 5/26/2023 |
| 64972 | Bryan | Nicol | 5/26/2023 | Exam | Active | PT | 5/26/2023 |
| 64978 | Tyler | Nagae | 5/26/2023 | Exam | Active | PT | 5/26/2023 |
| 64974 | Allison | Hickey | 5/26/2023 | Exam | Active | PT | 5/26/2023 |
| 64979 | Elena | Martinez | 5/26/2023 | Exam | Active | PT | 5/26/2023 |
| 64971 | Eric | Vicinus | 5/26/2023 | Exam | Active | PT | 5/26/2023 |
| 64981 | Victoria | Ball | 5/30/2023 | Exam | Active | PT | 5/30/2023 |
| 64980 | Nancy | Ellis | 5/30/2023 | Exam | Active | PT | 5/30/2023 |
| 64983 | Tiffany | Conway | 5/31/2023 | Endorsement | Active | PT | 5/31/2023 |
| 10175 | Jonathan | Myers | 5/31/2023 | Endorsement | Active | PTA | 5/31/2023 |

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|----------------|---------------|------------------|------------------------|----------------|------------------|--------------|---------------------------|
| 64984 | Shannon | Garcia | 5/31/2023 | Endorsement | Active | PT | 5/31/2023 |
| 64987 | Braedon | Miller | 5/31/2023 | Exam | Active | PT | 5/31/2023 |
| 64986 | Adam | Young | 5/31/2023 | Endorsement | Active | PT | 5/31/2023 |
| 64988 | Cecelia | Summers | 5/31/2023 | Endorsement | Active | PT | 5/31/2023 |
| 64982 | Jamie | Stalder | 5/31/2023 | Exam | Active | PT | 5/31/2023 |
| 10176 | Anthony | Datu | 5/31/2023 | Endorsement | Active | PTA | 5/31/2023 |
| 64985 | Ryen | Bostick | 5/31/2023 | Endorsement | Active | PT | 5/31/2023 |
| 64990 | Miranda | Starr | 6/1/2023 | Exam | Temporary Permit | PT | 6/1/2023 |
| 10177 | Brent | Crawford | 6/1/2023 | Endorsement | Active | PTA | 6/1/2023 |
| 64989 | Morgan | Jones | 6/1/2023 | Endorsement | Active | PT | 6/1/2023 |
| 64991 | Megan | Veal | 6/1/2023 | Exam | Active | PT | 6/1/2023 |
| 64992 | Jeremy | Scheuermann | 6/2/2023 | Exam | Temporary Permit | PT | 6/2/2023 |
| 10178 | Megan | Fisher | 6/2/2023 | Endorsement | Active | PTA | 6/2/2023 |
| 64996 | Liam | Metzsch | 6/5/2023 | Exam | Active | PT | 6/5/2023 |
| 60099 | Shermaine | Baker | 6/5/2023 | Endorsement | Active | PT | 1/28/2013 |
| 64993 | Gina | Lord | 6/5/2023 | Endorsement | Active | PT | 6/5/2023 |
| 64995 | Rebecca | Younger | 6/5/2023 | Exam | Active | PT | 6/5/2023 |
| 64994 | Jocelyn | Harte | 6/5/2023 | Endorsement | Active | PT | 6/5/2023 |
| 64999 | Zachary | Mazeski | 6/6/2023 | Exam | Active | PT | 6/6/2023 |
| 64998 | Shai | Sewell | 6/6/2023 | Endorsement | Active | PT | 6/6/2023 |
| 64997 | Dale | Gibbs | 6/6/2023 | Endorsement | Active | PT | 6/6/2023 |
| 65000 | Lynne | Johnson | 6/7/2023 | Exam | Temporary Permit | PT | 6/7/2023 |
| 65002 | Michael | Wilson | 6/8/2023 | Exam | Temporary Permit | PT | 6/8/2023 |
| 3946 | Amilia | Elliott | 6/8/2023 | Endorsement | Active | PT | 1/24/2000 |
| 65001 | Gillian | Beran-Maryott | 6/8/2023 | Endorsement | Active | PT | 6/8/2023 |
| 65003 | Rachael | Schmelling | 6/9/2023 | Exam | Temporary Permit | PT | 6/9/2023 |
| 65006 | Emma | Morgan | 6/12/2023 | Exam | Active | PT | 6/12/2023 |
| 10179 | Brandon | Hoyle | 6/12/2023 | Endorsement | Active | PTA | 6/12/2023 |
| 65004 | Carolyn | Mistele | 6/12/2023 | Endorsement | Active | PT | 6/12/2023 |
| 65009 | Joseph | Bauer | 6/12/2023 | Endorsement | Active | PT | 6/12/2023 |
| 65005 | Emily | Hill | 6/12/2023 | Endorsement | Active | PT | 6/12/2023 |
| 65007 | Katherine | Shaw | 6/12/2023 | Endorsement | Active | PT | 6/12/2023 |
| 65008 | Joseph | Fitzsimmons | 6/12/2023 | Exam | Active | PT | 6/12/2023 |
| 65010 | Emily | Tatsumi | 6/13/2023 | Exam | Active | PT | 6/13/2023 |
| 65011 | Scott | Kushner | 6/13/2023 | Endorsement | Active | PT | 6/13/2023 |
| 65013 | Nathan | Palmer | 6/14/2023 | Exam | Active | PT | 6/14/2023 |
| 65012 | Mai | Yang | 6/14/2023 | Endorsement | Active | PT | 6/14/2023 |
| 65014 | Stephanie | Boehm | 6/14/2023 | Exam | Active | PT | 6/14/2023 |
| 65015 | Mackenzie | Weisman | 6/15/2023 | Endorsement | Active | PT | 6/15/2023 |
| 65016 | Ava | Steffen | 6/22/2023 | Endorsement | Active | PT | 6/22/2023 |
| 65017 | Danielle | Harris | 6/23/2023 | Exam | Active | PT | 6/23/2023 |
| 9837 | Leslie | Donnelly | 6/23/2023 | Endorsement | Active | PTA | 1/27/2020 |
| 65019 | Daniel | Roselio Lafuente | 6/26/2023 | Exam | Temporary Permit | PT | 6/26/2023 |
| 65020 | Taylor | Hefty | 6/26/2023 | Exam | Temporary Permit | PT | 6/26/2023 |
| 65018 | Paolo Enrique | Llamado | 6/26/2023 | Endorsement | Active | PT | 6/26/2023 |

| License Number | First Name | Last Name | License Effective Date | License Method | License Status | License Type | Initial Registration Date |
|----------------|------------|-----------|------------------------|----------------|------------------|--------------|---------------------------|
| 65021 | Amanda | Howar | 6/27/2023 | Endorsement | Active | PT | 6/27/2023 |
| 10184 | Carly | Petesz | 6/27/2023 | Exam | Temporary Permit | PTA | 6/27/2023 |
| 10185 | Bethany | Criddle | 6/29/2023 | Endorsement | Active | PTA | 6/29/2023 |
| 65022 | Tiernan | Pietsch | 6/29/2023 | Exam | Active | PT | 6/29/2023 |

| License Type | Endorsement | Exam | Grand Total |
|--------------------|-------------|-----------|-------------|
| PT | 50 | 68 | 118 |
| Active | 50 | 56 | 106 |
| Temporary Permit | | 12 | 12 |
| PTA | 16 | 1 | 17 |
| Active | 15 | 1 | 16 |
| Temporary Permit | 0 | 1 | 1 |
| Grand Total | 65 | 70 | 135 |

*Note: Where Initiation Registration Date is before Effective Date License Transaction is either a change from prior status, such as Temp to Active, or renewal of Lapsed License, or re-application of an Expired License.

EXECUTIVE DIRECTOR'S REPORT

JULY 2023 | FOR THE PERIOD 05/01/2023 – 06/30/2023

21-23 BIENNIUM BUDGET VS. ACTUAL PERFORMANCE

Actuals to Budget through **most current closed** period (July 2021-MAY 2023).

| | Jul '21 –May '23 | Budget (to date) | \$ Variance | % of Budget (to date) |
|---------|------------------|------------------|----------------|-----------------------|
| Income | \$ 1,617,338.88 | \$ 1,602,282.40 | \$ 15,056.48 | 100.39% |
| Expense | \$ 1,413,018.16 | \$ 1,694,137.19 | \$ -281,119.03 | 83.4% |

NOTES –The final month of the biennium was not ready to process in time for the July board meeting, as we are awaiting billings from some other agencies for services during the biennium needing to properly book the accruals. The financials for June as well as the 21-23 biennium will be presented at the next board meeting.

ATTACHED FINANCIAL REPORTS

- July 2021-May 2023 Budget Vs. Actual Report

EDUCATION & OUTREACH ACTIVITIES –05/13/2023 - 07/19/2023

07/18/2023 – Participate with APTA-OR at FSBPT Model Practice Act Workshop.

ADMINISTRATION

- Records: Staff completed records archiving project that consolidated historical records at Secretary of State records and archives divisions in lieu of external offsite storage, reducing fees and increasing security and compliance.
- Information Technology & Security: Staff completed IT lifecycle replacement project to replace aging equipment consistent with the Board's IT plan, replacing equipment that could no longer install the most recent operating system and/or security updates.
- Information Technology & Security: The grant-funded work to implement an API between the Board's licensing system and the FSBPT ELDD/NPTE for the automation of score report receipt and entry is currently in final testing. This effort will eliminate the need for staff to manually download and enter NPTE and OR-JAM score reports, resulting in time-savings for application processing and reduced risk of errors.

LICENSE COUNTS BY STATUS AS OF JULY 01, 2023

| License Status | PT | PTA | TOTAL |
|----------------|-------|-------|-------|
| Active | 5,309 | 1,249 | 6,558 |
| Restricted | 2 | 1 | 3 |
| Probation | 2 | 0 | 2 |

| License Status | PT | PTA | TOTAL |
|----------------------------------|--------------|--------------|--------------|
| Lapsed (five or fewer years) | 1,539 | 527 | 2,066 |
| Change since last | (4) | (2) | (6) |
| Expired (more than five years) | 4,820 | 1,459 | 6,279 |
| | (6) | 0 | (6) |
| Total Previously Licensed | 6,369 | 1,988 | 8,357 |

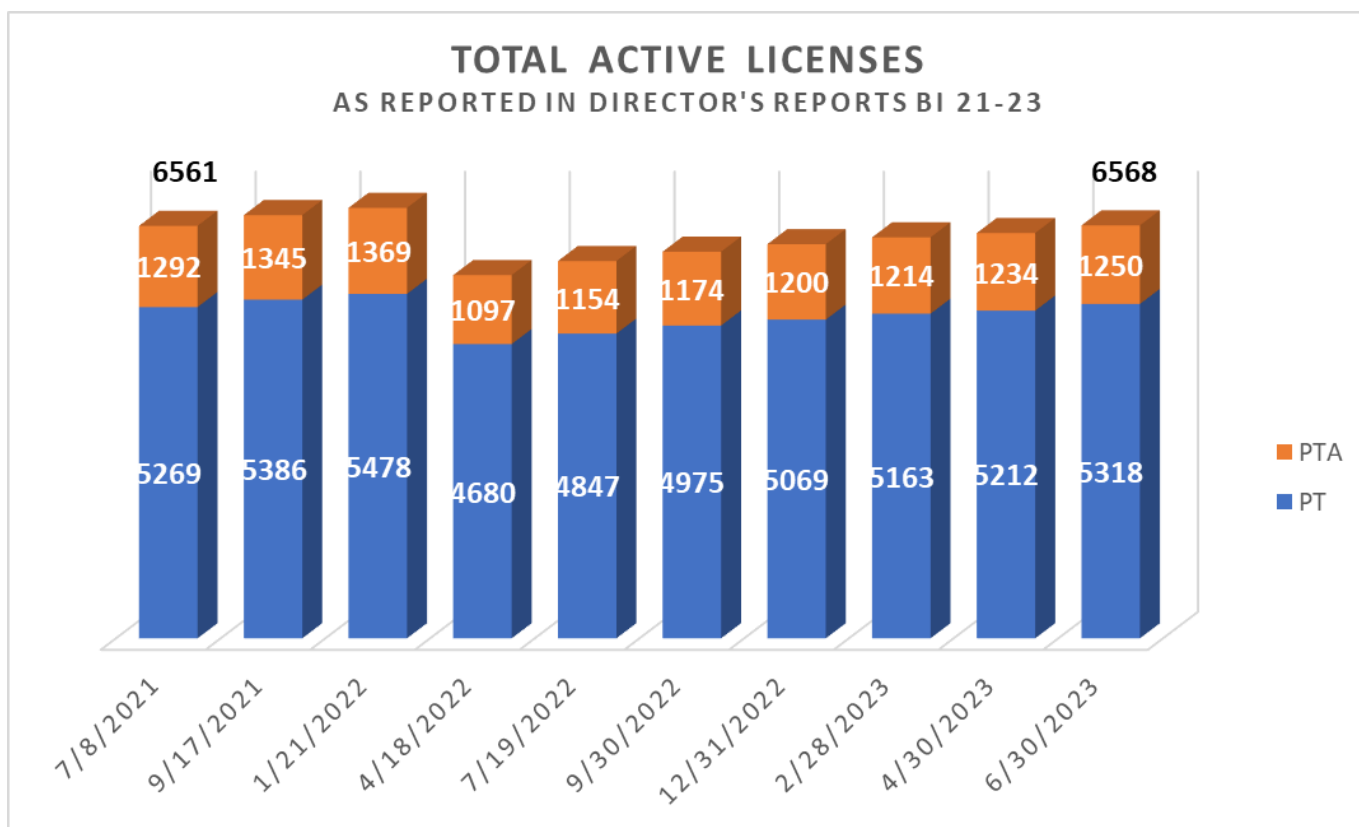
| | | | |
|------------------------------|--------------|--------------|--------------|
| Suspended | 5 | 0 | 5 |
| Total Licensed | 5,318 | 1,250 | 6,568 |
| <i>Net change since last</i> | <i>+106</i> | <i>+16</i> | <i>+122</i> |

| | | | |
|----------------------|----|---|----|
| Temp Permit | 12 | 5 | 17 |
| Temp-Military Spouse | 2 | 0 | 2 |

| Applications Submitted by Type 5/1/2023-6/30/2023 | EXA | END | TOTAL |
|--|-----------|-----------|------------|
| PT | 54 | 37 | 91 |
| PTA | 13 | 13 | 26 |
| TOTAL | 67 | 50 | 117 |

BIENNIUM TOTAL ACTIVE LICENSE COUNTS AS OF JUNE 30, 2023

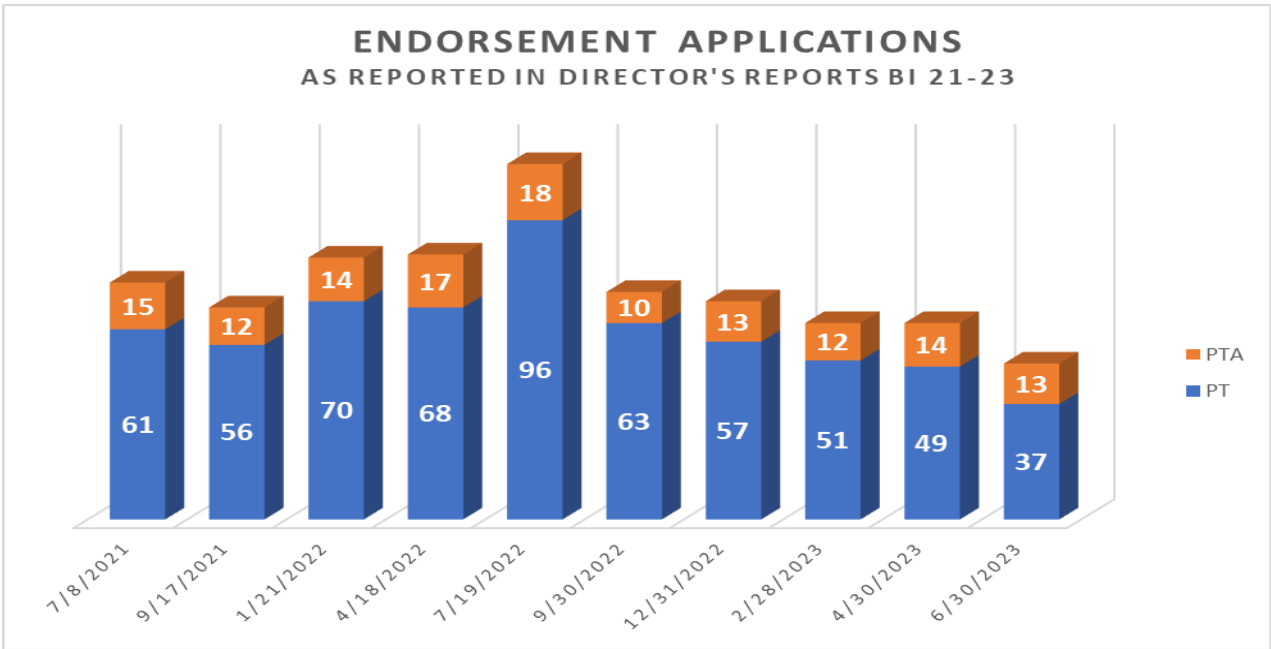
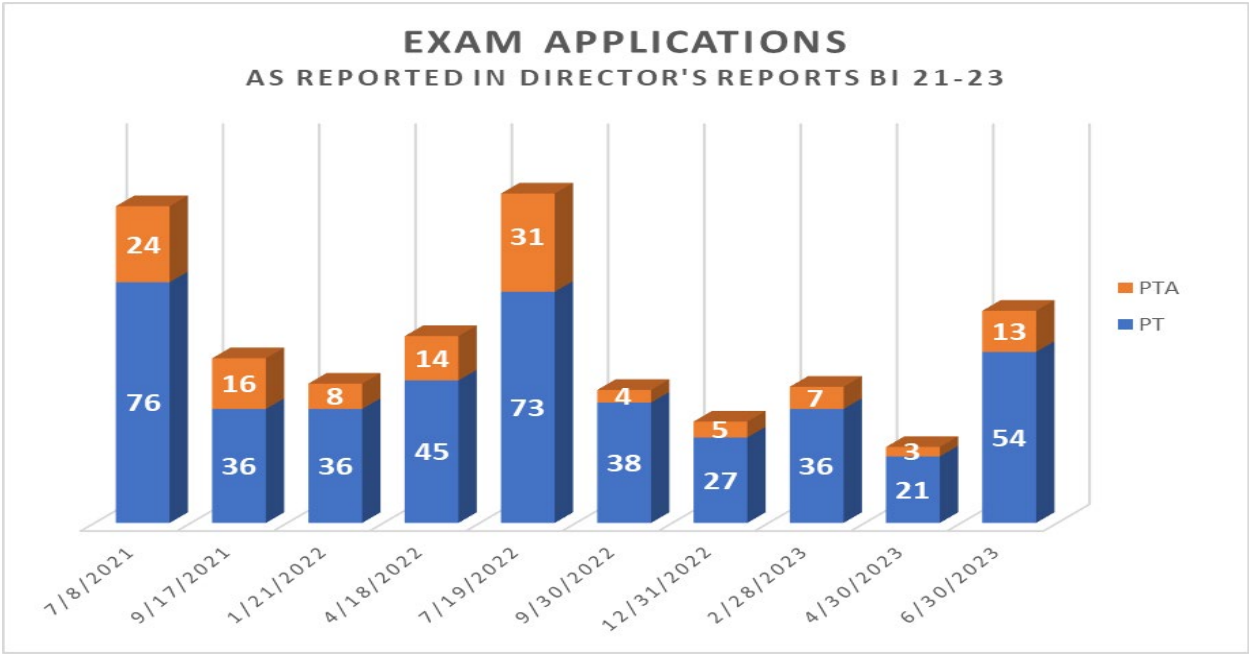
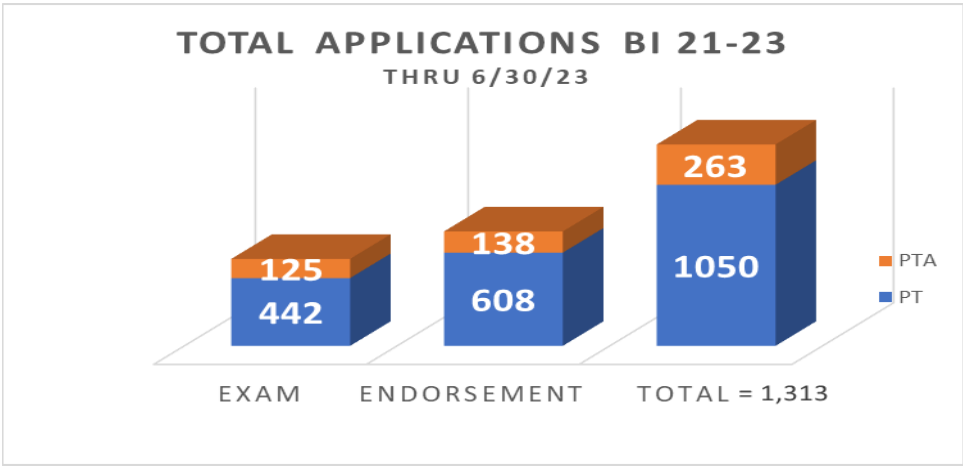
NOTE: Numbers have historically been reported through a date the week before each Board meeting; this changed at the end of 2022 and numbers are reported at the end of each month prior to Board meetings, which will allow for alignment with the Biennium reporting. License counts by status for the prior section and this section are sourced from the licensing system licensee status statistical report and reflect the counts as of a given day.



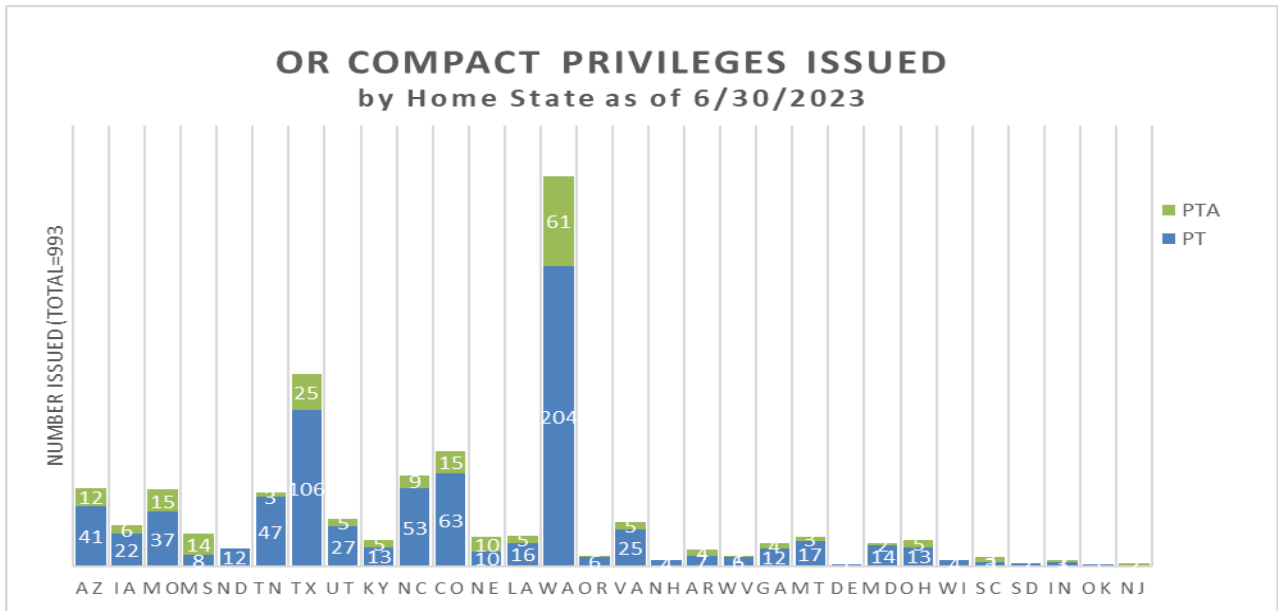
When viewed over the course of a biennium, the drop off in active licenses after renewal is typical based on historical patterns. The total as of approx. 7/1/2021 and the final period of the BI are noted, showing net flat growth. New applications offset non-renewals.

BIENNIUM TOTAL APPLICATIONS SUBMITTED AS OF JUNE 30, 2023

NOTE: Numbers have historically been reported through a date the week before each board meeting; this changed at the end of 2022 and numbers are reported at the end of each month prior to board meetings, which will allow for alignment with the Biennium reporting. Application data taken from licensing system based on date of submittal; applications may not be complete when first submitted, and final approval may appear in a different reporting period.

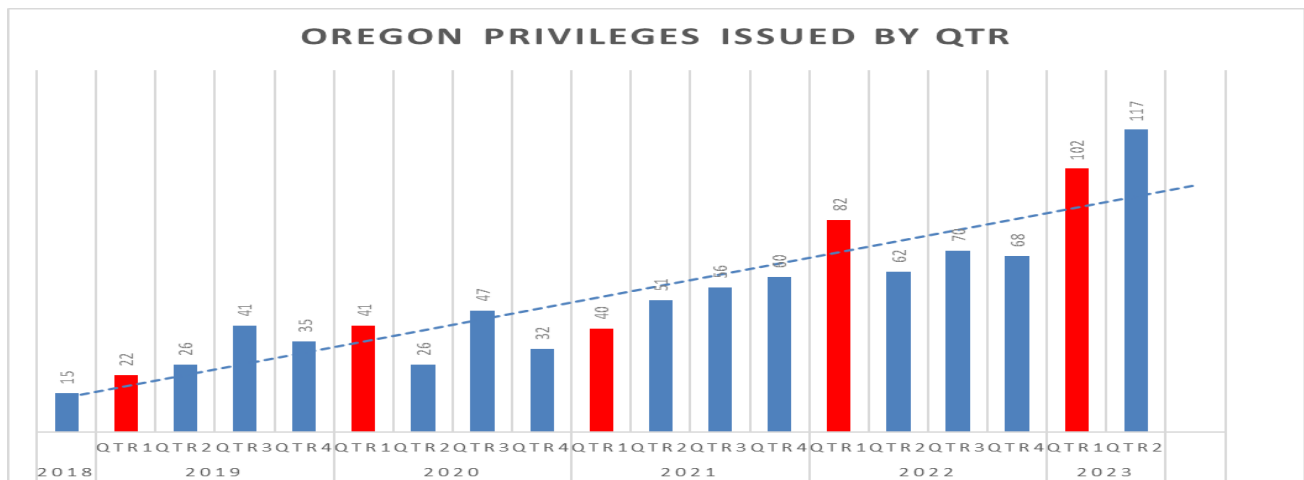
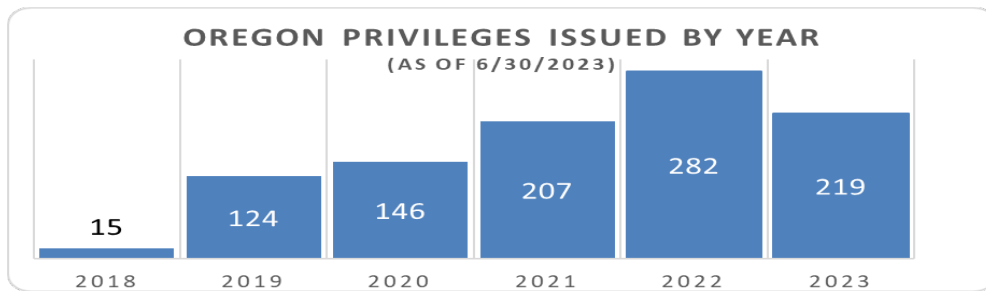


PT COMPACT OREGON PRIVILEGE HOLDERS – AS OF JUN 30, 2023



| OR Privileges Issued | AZ | IA | MO | MS | ND | TN | TX | UT | KY | NC | CO | NE | LA | WA | OR | VA | NH | AR | WV | GA | MT | DE | MD | OH | WI | SC | SD | IN | OK | NJ | Grand Total |
|----------------------|-----------|-----------|-----------|-----------|-----------|-----------|------------|-----------|-----------|-----------|-----------|-----------|-----------|------------|----------|-----------|----------|-----------|----------|-----------|-----------|----------|-----------|-----------|----------|----------|----------|----------|----------|----------|-------------|
| Initial | 41 | 24 | 45 | 15 | 11 | 44 | 117 | 25 | 16 | 46 | 65 | 16 | 15 | 176 | 6 | 29 | 4 | 11 | 5 | 15 | 15 | 1 | 14 | 17 | 3 | 6 | 2 | 4 | 1 | 2 | 791 |
| Renewal | 12 | 4 | 7 | 7 | 1 | 6 | 14 | 7 | 2 | 16 | 13 | 4 | 6 | 89 | 1 | 1 | | | 2 | 1 | 5 | | 2 | 1 | 1 | | | | | | 202 |
| Grand Total | 53 | 28 | 52 | 22 | 12 | 50 | 131 | 32 | 18 | 62 | 78 | 20 | 21 | 265 | 7 | 30 | 4 | 11 | 7 | 16 | 20 | 1 | 16 | 18 | 4 | 6 | 2 | 4 | 1 | 2 | 993 |

NOTES: Cumulative total privileges purchased since Oregon began issuing privileges—not total number of current active privileges. Oregon privileges have been purchased in all 30 states currently issuing privileges out of 34 total member states.



NOTES: Data for all tables and graphs sourced from PTCC compact privilege purchase reports; data through 6/30/2023.

INVESTIGATIONS: OPEN CASES & AGING REPORT

Jul-23 OBPT Open Cases

| | |
|----|---|
| 26 | Total Open Cases |
| 10 | Presenting to Board July 2022 Meeting |
| 3 | Post Board Meeting (Notice/Hearing Process) |

23 Remaining Open Cases

Remaining Open Case Aging (date of complaint thru Present to Board)

| | |
|---|---|
| 9 | Case(s) currently over four months (120 days) |
| 1 | Additional case(s) will be over four months (120 days) by Sept 2023 meeting |
| 3 | Case(s) that will be under four months (120 days) by Sept 2023 meeting |

| | |
|----|-------|
| 13 | Total |
|----|-------|

Based on case tracking status on 07/11/2023.

NOTE: Approval of the Executive Director's Report will also authorize extension(s) of investigation period for case reporting to the Board under ORS 676.165 where case(s) will exceed 120 days based on the date of the next available scheduled meeting.

CASES OPENED AND CLOSED PER BIENNIUM THROUGH BI 2021-2023

| BIENNIUM | 2013 2015 | 2015 2017 | 2017 2019 | 2019 2021 | 2021 2023 |
|---|--------------|--------------|--------------|--------------|--------------|
| Cases Opened | 88 | 58 | 56 | 49 | 98 |
| Cases Closed | 82 | 54 | 71 | 48 | 82 |
| Compact Opened Percent of Total Opened | | | 1 2% | 3 6% | 26 27% |

NOTE: Total cases opened, and total cases closed in each biennium. Cases opened in one period may be closed in the subsequent period dependent on when received. Does not reflect type of action taken, only raw counts. Data sourced from case tracking report on 07/11/2023 and is inclusive of all of 2021-2023 biennium.

Oregon Board of Physical Therapy Profit & Loss Budget vs. Actual

July 2021 through May 2023

| | Jul '21 - May 23 | Budget | \$ Over Budget | % of Budget |
|---|---------------------|---------------------|-------------------|-----------------|
| Ordinary Income/Expense | | | | |
| Income | | | | |
| 4000 · Income | | | | |
| 4100 · Physical Therapists | | | | |
| 4132 · PT Renewal Ver & Proc Fees | 117,275.00 | 258,823.53 | -141,548.53 | 45.3% |
| 4112 · PT App Ver & Proc Fees | 52,290.00 | 50,543.65 | 1,746.35 | 103.5% |
| 4126 · PT Temp Mil SP/DP | 297.00 | | | |
| 4110 · PT Exam Applications | 69,335.00 | 53,889.00 | 15,446.00 | 128.7% |
| 4120 · PT Endorsement Applications | 94,139.00 | 95,231.00 | -1,092.00 | 98.9% |
| 4125 · PT Temporary Permits | 2,150.00 | 1,794.00 | 356.00 | 119.8% |
| 4130 · PT Renewals | 941,830.00 | 834,380.00 | 107,450.00 | 112.9% |
| 4140 · PT Delinquent Renewals | 4,150.00 | 3,987.00 | 163.00 | 104.1% |
| 4150 · PT Duplicate Licenses | 0.00 | 0.00 | 0.00 | 0.0% |
| 4170 · PT Civil Penalties | 4,250.00 | 2,600.00 | 1,650.00 | 163.5% |
| Total 4100 · Physical Therapists | 1,285,716.00 | 1,301,248.18 | -15,532.18 | 98.8% |
| 4200 · Physical Therapist Assistants | | | | |
| 4232 · PTA Renewal Ver & Proc Fees | 25,576.00 | 50,427.27 | -24,851.27 | 50.7% |
| 4212 · PTA App Ver & Proc Fees | 11,907.00 | 10,289.51 | 1,617.49 | 115.7% |
| 4227 · PTA Temp-EOBED | 0.00 | 0.00 | 0.00 | 0.0% |
| 4210 · PTA Exam Applications | 19,864.00 | 17,940.00 | 1,924.00 | 110.7% |
| 4220 · PTA Endorse Applications | 19,659.00 | 15,947.00 | 3,712.00 | 123.3% |
| 4225 · PTA Temporary Permits | 600.00 | 0.00 | 600.00 | 100.0% |
| 4230 · PTA Renewals | 145,997.00 | 134,915.00 | 11,082.00 | 108.2% |
| 4240 · PTA Delinquent Renewals | 1,750.00 | 1,395.00 | 355.00 | 125.4% |
| 4250 · PTA Duplicate Licenses | 0.00 | 0.00 | 0.00 | 0.0% |
| 4270 · PTA Civil Penalties | 1,247.50 | 0.00 | 1,247.50 | 100.0% |
| Total 4200 · Physical Therapist Assistants | 226,600.50 | 230,913.78 | -4,313.28 | 98.1% |
| 4300 · PT & PTA Combined | | | | |
| 4360 · OHA Workforce Data Survey Fee | 23,212.00 | 23,514.44 | -302.44 | 98.7% |
| 4350 · PT Compact Fees | 26,064.00 | 19,167.00 | 6,897.00 | 136.0% |
| 4330 · PTand/or PTA Mailing Diskette | 12,400.00 | 7,973.00 | 4,427.00 | 155.5% |
| Total 4300 · PT & PTA Combined | 61,676.00 | 50,654.44 | 11,021.56 | 121.8% |
| 4400 · PT/PTA License Verification Fee | 23,625.00 | 19,167.00 | 4,458.00 | 123.3% |
| 4500 · Miscellaneous Income | | | | |
| 4583 · 83300 IT Services | 5,390.47 | 0.00 | 5,390.47 | 100.0% |
| 4500 · Miscellaneous Income - Other | 14,242.10 | 299.00 | 13,943.10 | 4,763.2% |
| Total 4500 · Miscellaneous Income | 19,632.57 | 299.00 | 19,333.57 | 6,566.1% |

Oregon Board of Physical Therapy Profit & Loss Budget vs. Actual

July 2021 through May 2023

| | Jul '21 - May 23 | Budget | \$ Over Budget | % of Budget |
|--|------------------|--------------|----------------|-------------|
| 4900 · Bank Interest Income | 88.81 | 0.00 | 88.81 | 100.0% |
| Total 4000 · Income | 1,617,338.88 | 1,602,282.40 | 15,056.48 | 100.9% |
| Total Income | 1,617,338.88 | 1,602,282.40 | 15,056.48 | 100.9% |
| Gross Profit | 1,617,338.88 | 1,602,282.40 | 15,056.48 | 100.9% |
| Expense | | | | |
| 5100 · Payroll Costs | | | | |
| 5132 · FICA (SS + Medicare) | 54,724.97 | 52,942.48 | 1,782.49 | 103.4% |
| 5133 · FICA Administrative Fee | 0.00 | 30.00 | -30.00 | 0.0% |
| 5110 · Gross Salaries | 698,877.19 | 692,061.79 | 6,815.40 | 101.0% |
| 5135 · Unemployment Benefits | 72.90 | | | |
| 5136 · Mass Transit Tax | 5,725.59 | 5,350.05 | 375.54 | 107.0% |
| 5140 · Employee Benefits | | | | |
| 5141 · PERS ER Paid EE Cont | -1,753.01 | 0.00 | -1,753.01 | 100.0% |
| 5142 · PERS ER Admin Contribution | 131,182.56 | 142,191.06 | -11,008.50 | 92.3% |
| 5143 · Obligation Bond Debt Repayment | 36,792.90 | 42,907.49 | -6,114.59 | 85.7% |
| 5144 · Workers Compensation | 144.28 | 345.00 | -200.72 | 41.8% |
| 5146 · PEBB Medical/Dental Insurance | | | | |
| 5146-1 · PEBB Insurance | 133,060.81 | 144,523.32 | -11,462.51 | 92.1% |
| 5146-2 · PEBB Insurance Refund | -8,996.26 | 0.00 | -8,996.26 | 100.0% |
| 5146 · PEBB Medical/Dental Insurance - ... | 0.00 | 0.00 | 0.00 | 0.0% |
| Total 5146 · PEBB Medical/Dental Insurance | 124,064.55 | 144,523.32 | -20,458.77 | 85.8% |
| 5140 · Employee Benefits - Other | 65.23 | 9,583.00 | -9,517.77 | 0.7% |
| Total 5140 · Employee Benefits | 290,496.51 | 339,549.87 | -49,053.36 | 85.6% |
| 5150 · Employee Training | 2,045.69 | 19,167.00 | -17,121.31 | 10.7% |
| 5190 · Board Stipends | 28,137.00 | 28,750.00 | -613.00 | 97.9% |
| 5199 · Other Payroll Expenses | 0.00 | 4,692.00 | -4,692.00 | 0.0% |
| Total 5100 · Payroll Costs | 1,080,079.85 | 1,142,543.19 | -62,463.34 | 94.5% |
| 5600 · Travel Costs | | | | |
| 5610 · Instate Travel | | | | |
| 5612 · Lodging | 1,567.02 | 5,750.00 | -4,182.98 | 27.3% |
| 5614 · Airfare/Mileage | 1,875.47 | 7,667.00 | -5,791.53 | 24.5% |
| 5616 · Meals | 351.28 | 3,833.00 | -3,481.72 | 9.2% |
| 5618 · OtherTravel Costs | 0.00 | 958.00 | -958.00 | 0.0% |
| Total 5610 · Instate Travel | 3,793.77 | 18,208.00 | -14,414.23 | 20.8% |

Oregon Board of Physical Therapy Profit & Loss Budget vs. Actual

July 2021 through May 2023

| | Jul '21 - May 23 | Budget | \$ Over Budget | % of Budget |
|---|-------------------|-------------------|-------------------|--------------|
| 5620 · Out of State Travel | | | | |
| 5622 · Lodging | 2,658.12 | 9,583.00 | -6,924.88 | 27.7% |
| 5624 · Airfare/Mileage | 2,423.02 | 9,200.00 | -6,776.98 | 26.3% |
| 5626 · Meals | 358.36 | 3,833.00 | -3,474.64 | 9.3% |
| 5628 · Other Travel Costs | 1,770.43 | 0.00 | 1,770.43 | 100.0% |
| Total 5620 · Out of State Travel | 7,209.93 | 22,616.00 | -15,406.07 | 31.9% |
| Total 5600 · Travel Costs | 11,003.70 | 40,824.00 | -29,820.30 | 27.0% |
| 6100 · General Office Expenses | | | | |
| 6110 · Copier | 790.86 | 1,840.00 | -1,049.14 | 43.0% |
| 6120 · Printing/Copying | 548.22 | 5,433.00 | -4,884.78 | 10.1% |
| 6140 · Office Supplies | 2,659.16 | 4,117.00 | -1,457.84 | 64.6% |
| 6145 · Other | 787.79 | 6,837.00 | -6,049.21 | 11.5% |
| 6150 · Board Meeting Expenses | 1,260.35 | 2,300.00 | -1,039.65 | 54.8% |
| 6155 · Parking Validation Stickers | 0.00 | 3,162.00 | -3,162.00 | 0.0% |
| 6180 · Telecommunications | 12,828.83 | 14,183.00 | -1,354.17 | 90.5% |
| 6185 · Bank Charges/Fees | 1,991.81 | 7,667.00 | -5,675.19 | 26.0% |
| 6186 · Liability Insurance (Risk Mgmt) | 34,663.00 | 35,000.00 | -337.00 | 99.0% |
| Total 6100 · General Office Expenses | 55,530.02 | 80,539.00 | -25,008.98 | 68.9% |
| 6190 · Dues and Subscriptions | 5,679.00 | 19,167.00 | -13,488.00 | 29.6% |
| 6200 · Postage | | | | |
| 6210 · Mail/Mail Room Charges | 408.64 | 3,833.00 | -3,424.36 | 10.7% |
| 6220 · Newsletters | 0.00 | 0.00 | 0.00 | 0.0% |
| 6240 · Other | 0.00 | 0.00 | 0.00 | 0.0% |
| Total 6200 · Postage | 408.64 | 3,833.00 | -3,424.36 | 10.7% |
| 6300 · Publications | 0.00 | 613.00 | -613.00 | 0.0% |
| 6400 · Contracted Services | | | | |
| 6405 · Merchant Account Fees | 43,451.13 | 37,500.00 | 5,951.13 | 115.9% |
| 6410 · Investigators | 0.00 | 2,875.00 | -2,875.00 | 0.0% |
| 6420 · Computer Support | 3,561.33 | 46,000.00 | -42,438.67 | 7.7% |
| 6430 · Attorney General-Legal Counsel | 58,898.20 | 76,667.00 | -17,768.80 | 76.8% |
| 6440 · Audit Charges | 8,500.00 | 12,583.00 | -4,083.00 | 67.6% |
| 6450 · Accountant / CPA | 0.00 | 958.00 | -958.00 | 0.0% |
| 6460 · Payroll Service Charges | 4,945.29 | 5,750.00 | -804.71 | 86.0% |
| 6470 · Payroll Expenses | 178.77 | | | |
| 6490 · DAS Charges (Miscellaneous) | 342.00 | 3,325.00 | -2,983.00 | 10.3% |
| 6495 · EmplDept/HearingOfficerPanel | 1,117.00 | 4,792.00 | -3,675.00 | 23.3% |
| 6499 · Other Services | 1,002.78 | 22,000.00 | -20,997.22 | 4.6% |
| Total 6400 · Contracted Services | 121,996.50 | 212,450.00 | -90,453.50 | 57.4% |

Oregon Board of Physical Therapy Profit & Loss Budget vs. Actual

July 2021 through May 2023

| | Jul '21 - May 23 | Budget | \$ Over Budget | % of Budget |
|---|---------------------|---------------------|--------------------|----------------|
| 6500 · Rent and Occupancy | | | | |
| 6510 · Rent | 48,029.74 | 42,167.00 | 5,862.74 | 113.9% |
| 6500 · Rent and Occupancy - Other | 0.00 | 0.00 | 0.00 | 0.0% |
| Total 6500 · Rent and Occupancy | 48,029.74 | 42,167.00 | 5,862.74 | 113.9% |
| 6600 · Background Checks | | | | |
| 6630 · Vantage Data | 0.00 | 29,517.00 | -29,517.00 | 0.0% |
| 6600 · Background Checks - Other | 50,506.00 | 51,750.00 | -1,244.00 | 97.6% |
| Total 6600 · Background Checks | 50,506.00 | 81,267.00 | -30,761.00 | 62.1% |
| 6650 · Investigation Expenses | 0.00 | 200.00 | -200.00 | 0.0% |
| 6800 · Computers & Accessories | | | | |
| 6810 · Software | 37,821.31 | 65,167.00 | -27,345.69 | 58.0% |
| 6820 · Hardware | 463.25 | 4,600.00 | -4,136.75 | 10.1% |
| 6830 · Maintenance-E-Mail,Firewall | 140.15 | 0.00 | 140.15 | 100.0% |
| 6840 · Other - Data Lines, etc. | 1,360.00 | 767.00 | 593.00 | 177.3% |
| Total 6800 · Computers & Accessories | 39,784.71 | 70,534.00 | -30,749.29 | 56.4% |
| Total Expense | 1,413,018.16 | 1,694,137.19 | -281,119.03 | 83.4% |
| Net Ordinary Income | 204,320.72 | -91,854.79 | 296,175.51 | -222.4% |
| Net Income | 204,320.72 | -91,854.79 | 296,175.51 | -222.4% |



Oregon Board of Physical Therapy

Summary Report: Developing Culturally Responsive Regulation

Oregon Board of Physical Therapy

Strategic Planning: Developing Culturally Responsive Regulation

Introduction

The Oregon Board of Physical Therapy is a semi-independent state agency formed with the statutory purpose to protect the public health, safety, and welfare for all Oregonians by maintaining standards for quality care, professional skill and competence through the effective regulation of the practice of physical therapy. The Board is comprised of eight board members including five members licensed Physical Therapists, one licensed Physical Therapist Assistant and two members of the general public. The agency has an administrative staff of 3.6 FTE and an operational budget of approximately \$1.8 million per biennium. The Board oversees a licensee population of approximately 6,500 professionals, as well as individuals authorized to practice in the State of Oregon via a multi-state Compact.



About Physical Therapy

The practice of physical therapy helps patients achieve positive health outcomes. Licensed physical therapists and physical therapist assistants help patients maximize movement, manage pain, frequently avoid surgery and prescription drugs, manage chronic (long-term) conditions, and recover from and prevent injury.

While Oregon issues a general license to practice, individual practitioners specialize in a wide variety of areas and often hold additional certifications in those areas, including Orthopedics, Neurology, Pediatrics, Geriatrics, Oncology, Women’s Health, Cardiovascular & Pulmonary, Sports, Wound Management, and Animal Therapy. Professionals also work in a large variety of practice settings, including Acute Care, Skilled Nursing, Outpatient, Home Health, Private Clinics, Schools, Sports Teams, and Employer Workplaces. Patients also have broad access to care, with both provider referral or direct patient access pathways allowed in Oregon, dependent on the individual’s coverage requirements, if any. Physical Therapy is generally covered under commercial insurance, Medicare/Medicaid, and individual providers may access those, as well as third-party payors or private pay.

Physical Therapy Workforce

According to data gathered from licensees upon renewal of license by the Oregon Health Authority Healthcare Workforce Reporting Program (HWRP), the distribution of licensed professionals throughout the state is uneven, and employers have expressed difficulty in finding sufficient capacity to meet needs. Even when the raw numbers show availability of professionals in a given area, the individuals may not hold all the specializations desired, or work in the specific care setting with the shortage. Workforce availability data must consider this factor before making any conclusions about sufficient capacity. To meet the gaps, employers frequently make

Oregon Board of Physical Therapy

Strategic Planning: Developing Culturally Responsive Regulation

use of travelers or temporary staffing to meet their needs. These are often individuals who will work in the state for a limited amount of time either with an Oregon license, or more recently, with a Compact privilege.

In addition, according to HWRP data, the demographics of the PT/PTA licensed workforce do not match the demographics of the Oregon population overall, with the largest underrepresentation for the Latino/a/x community. More detailed information can be explored interactively at the [Oregon Health Authority Healthcare Workforce Reporting Data](#) website for PT/PTA and most other healthcare professionals. Due to the reporting cycles relative to the Board’s license renewal cycle, there can be a long lead time before data is reflected in these reports. Furthermore, licensees who do not renew their Oregon license, or those working on a Compact Privilege, do not complete the survey. The Board estimates this to be approximately 20% of the workforce, based on the number of non-renewed licenses each renewal period.

Building A Strategic Plan

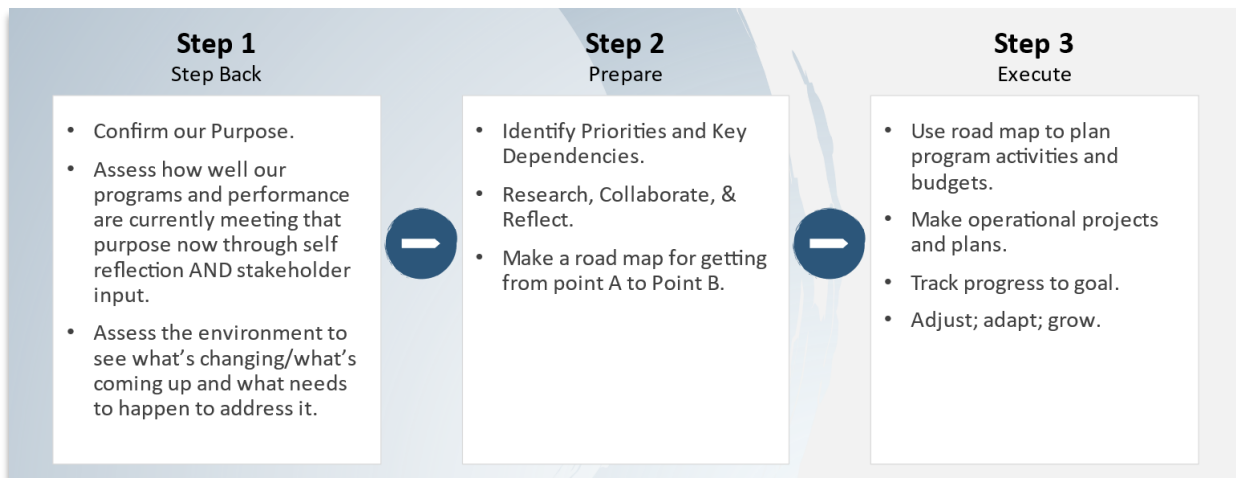
Since 2018, the OBPT has engaged in a community strategic planning process, which includes a minimum of an annual dedicated meeting where all interested parties are invited to directly participate, or at a minimum, provided the opportunity to review and comment on materials derived from these sessions.

(NOTE: The 2019 session was cancelled due to illness).

Strategic Planning Approach

The OBPT views the purpose of strategic planning as the mechanism through which the organization can verify that we are doing the Right Things at the Right Time in the Right Way. The process results in the support of three key processes: prioritization (to inform long-range planning and policy; rule-making and legislative agendas), communication (to listen, to gain feedback, and to demonstrate how the Board is achieving mission), and implementation (to inform the development and operation of program and budget priorities).

The planning process is an on-going, *iterative* 3-step process that includes Stepping Back, Preparing, and Executing, as illustrated below. The process is intended to move back and forth as appropriate between the steps, not serve as a one-time linear progression.



2020 Planning Exercise

In 2020, the OBPT—in collaboration with community members and interested parties—used the process to step back and evaluate the Board within the broader statewide and statutory context, particularly with regard to diversity, equity, and inclusion within the physical therapy workforce itself, as well as within the Board’s programs, processes, and requirements. The following mapping was completed in November and December 2020.

Oregon Board of Physical Therapy

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I. Oregon State Mandates/Initiatives (Context):

- **ORS 676.303(2)**—All health professional regulatory boards shall operate with the primary purposes of:
 - promoting the quality of health services provided,
 - protecting the public health, safety and welfare by ensuring that licensees practice with professional skill and safety...”

How this connects: By recognizing that there is currently a differential in the health outcomes for many patients from underrepresented populations and recognizing that the Board has an obligation to promote quality health care and protect the health, safety and welfare of all patients, culturally competent practice is essential.

- **ORS 676.400**--Racial and ethnic composition of regulated health professions; findings; duties of health professional regulatory boards.
 - (3) “Health professional regulatory boards shall establish programs to increase the representation of people of color and bilingual people on the boards and in the professions that they regulate. Such programs must include activities to promote the education, recruitment and professional practice of members of these targeted populations in Oregon.”
 - (4) “Each health professional regulatory board shall maintain records of the racial and ethnic makeup of applicants and professionals regulated by the board....”

How this connects: Oregon health professional regulatory boards have been specifically charged to establish programs that increase representation of under-represented groups both on the Board itself, as well as in the regulated profession.

- **ORS 676.850**—Requires continuing competence for health professionals on renewal.
Oregon Health Authority (4 domains required for Cultural Competence Continuing Education Training)
 1. Culturally competent practice requires self-awareness and self-assessment of beliefs, attitudes, emotions, and values.
 2. Culturally competent practice requires the acquisition of knowledge by providers.
 3. Culturally competent practice requires the acquisition of skills by providers.
 4. Culturally competent training requires specific educational approaches for acquisition of knowledge and skills.

How this connects: Establishes common framework and mechanism for ongoing education for licensed professionals to support cultural competency.

- **ORS 676.410**--Information required for renewal of certain licenses.
“(2) An individual applying to renew a license with a health care workforce regulatory board must provide the information prescribed by the Oregon Health Authority pursuant to subsection (3) of this section to the health care workforce regulatory board. Except as provided in subsection (4) of this section, a health care workforce regulatory board may not approve an application to renew a license until the applicant provides the information.”

How this connects: Provides a mechanism for capturing demographic information from all licensed health professionals, which supports policy and planning.

Oregon Board of Physical Therapy

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- **Executive Order NO. 17-11 (2017) – Relating to Affirmative Action, Equal Employment, Opportunity, Diversity, Equity, and Inclusion (DEI)**

How this connects: Establishes statewide framework and objectives relating to state agencies—both staff and Board members; establishing goals relating to demographic composition of Boards and staff, as well as objectives relating to organizational culture based on a foundation of DEI.

- **Racial Justice Council – founded by Governor Kate Brown (2020) – “We must change how we listen to, engage with, respond to, and support Black, Indigenous and People of Color (BIPOC) and Tribal members in Oregon.”**

The Racial Justice Council’s charge is to:

- Direct the collection of data from across sectors of society to support smart, data-driven policy decisions.
 - Provide principles and recommendations that center racial justice to the Governor to inform the ‘21-23 Governor’s Recommended Budget and Tax Expenditures Report
 - Creating a Racial Justice Action Plan for six specific areas: Criminal Justice Reform and Police Accountability, Housing and Homelessness, Economic Opportunity, Health Equity, Environmental Equity, Education Recovery.
- **Oregon Statewide Diversity, Equity, and Inclusion Definitions (2020)**

State of Oregon’s Definition of Diversity, Equity, Inclusion

Diversity is the appreciation and prioritization of different backgrounds, identities, and experiences collectively and as individuals. It emphasizes the need for representation of communities that are systemically underrepresented and under-resourced. These differences are strengths that maximize the state’s competitive advantage through innovation, effectiveness, and adaptability.

Equity acknowledges that not all people, or all communities, are starting from the same place due to historic and current systems of oppression. Equity is the effort to provide different levels of support based on an individual’s or group’s needs in order to achieve fairness in outcomes. Equity actionably empowers communities most impacted by systemic oppression and requires the redistribution of resources, power, and opportunity to those communities.

Inclusion is a state of belonging when persons of different backgrounds, experiences, and identities are valued, integrated, and welcomed equitably as decision makers, collaborators, and colleagues. Ultimately, inclusion is the environment that organizations create to allow these differences to thrive.

Office of Governor Kate Brown

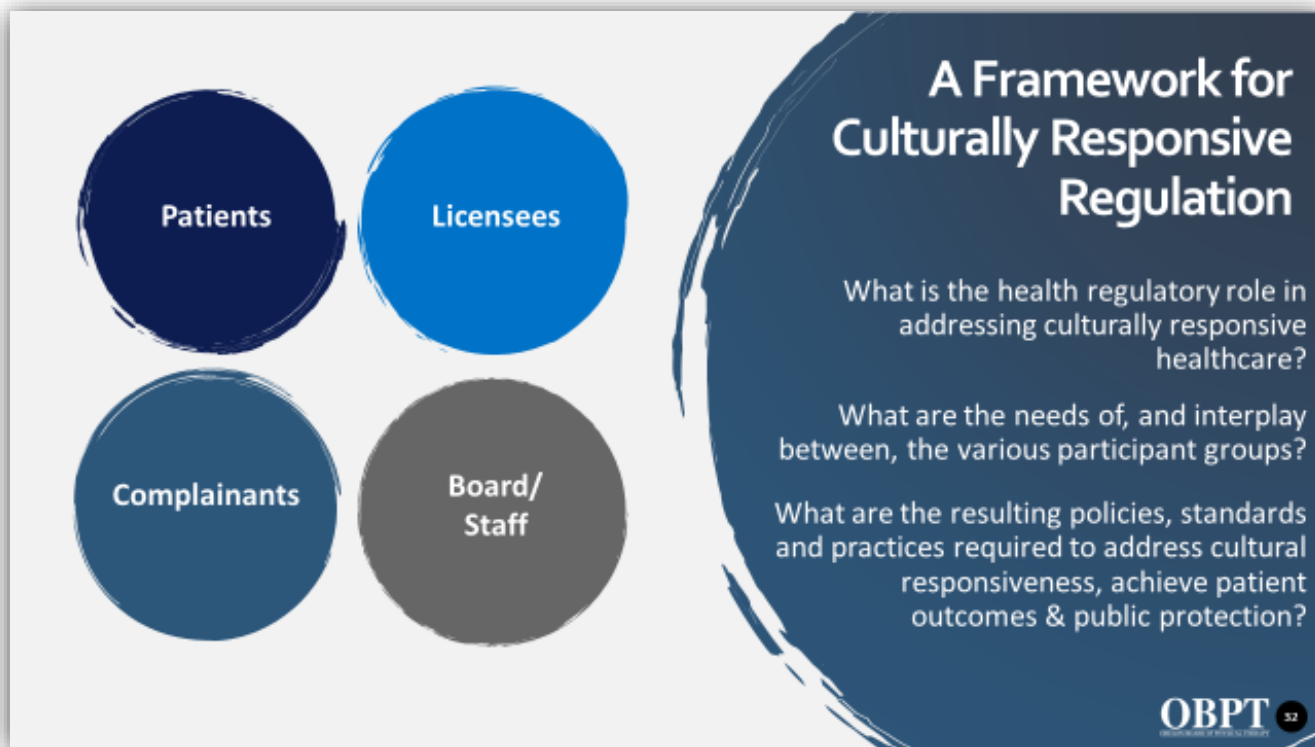
How this connects: Creates overarching lens for all state programs, and funding decisions.

Oregon Board of Physical Therapy

Strategic Planning: Developing Culturally Responsive Regulation

II. Oregon Board of Physical Therapy Strategic Approach: (Pulling it all together)

Instead of thinking of each statutory requirement in isolation, the Oregon Board has adopted a framework for considering DEI, racial justice, and cultural competency topics using four inter-related participant groups. Any policy or rule will consider the role of or impacts to each of these groups—and the specific diversity of participants in each group—with the end goal of achieving culturally competent regulation. This framework and focus on DEI in the context of our operations and services complements the Board’s internally focused affirmative action and DEI plans.



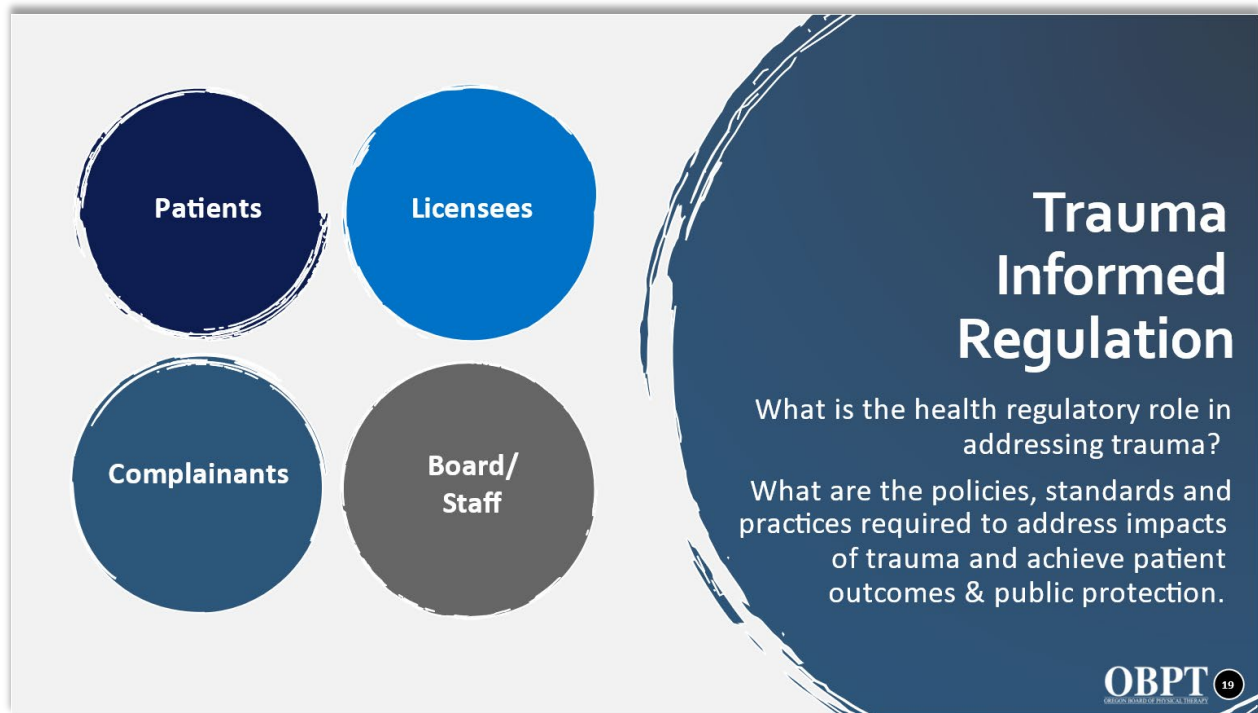
Within this framework, the OBPT will consider the perspectives of and impacts on all participants in any regulatory function as we address the guiding question of our role as a regulatory entity in addressing culturally responsive healthcare. To consider the needs of and interplay between these participant groups, and further, to understand, include, and support the diversity of participants within each of these groups, and understand the impacts when there is an imbalance or inquiry in any part of the system.

III. Other Lenses: Trauma-Informed Regulation

Trauma is a critical consideration in the provision of healthcare services, and training for healthcare professionals in trauma-informed care is increasingly prevalent and increasingly linked to achievement of positive health outcomes for patients. Recognition of trauma and the interplay with any work on diversity, equity, and inclusion is essential, as the experience of acts of marginalization, oppression, and racism also fundamentally create trauma. The OBPT is committed to the framework of trauma-informed regulation in addition to, and as part of the framework of culturally responsive regulation.

Oregon Board of Physical Therapy

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Trauma: Defining Terms

Although often used interchangeably, the OBPT recognizes that there is a variety of kinds of trauma, and the drivers and impacts of each can be very different, just as a specific event can generate different responses in individuals dependent on their varied lived experiences and other traumas they've already experienced. Awareness and understanding of the complexity and impacts of all trauma is essential in evaluating regulations, and in optimizing patient outcomes in healthcare. There is no single one size fits all universalism in addressing trauma.

Burnout: A state of emotional, physical, and mental exhaustion caused by excessive and prolonged stress. It occurs when you feel overwhelmed, emotionally drained, and unable to meet constant demands.

Compassion Fatigue: A condition characterized by emotional and physical exhaustion leading to a diminished ability to empathize or feel compassion for others, often described as the negative cost of caring.

Moral Injury: an injury to an individual's moral conscience and values resulting from an act of perceived moral transgression, which produces profound emotional guilt and shame, and in some cases also a sense of betrayal, anger and profound "moral disorientation".

Vicarious Trauma: Transformation in the self that results from empathic engagement with traumatized clients and their reports of traumatic experiences. Its hallmark is...disruption in perceived meaning and hope.

Direct Trauma: Direct exposure to trauma is any first-hand involvement with trauma, which could be acute (one time), chronic (repeated or prolonged) or complex (multiple trauma events).

Oregon Board of Physical Therapy

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IV. Oregon Board of Physical Therapy CRR Implementation

Key Identified Issues (or Dependencies):

- *Holistic systemic change will require partnership with other organizations (such as with OHA and with educational institutions) to increase the presence of candidates from underrepresented groups in the educational pathway. (NOTE: The Board initially used the term “pipeline”, but has shifted to using “pathway” as a more inclusive term.).*
- *Boards, including OBPT, do not currently reflect the demographic profile of the state of Oregon as a whole (patients) nor do they fully represent all licensed individuals at any one time. Infusing all perspectives—representation from all groups at all times—will require intentional training and partnership to inform policy.*

What We’ve Done So Far (December 2020):

- ORS 848-035-0030(1)(E)(b) – Effective April 1, 2020, all licensed physical therapist and physical therapy assistants must complete a minimum of one hour of continuing competence that meets the criteria for cultural competency education each renewal period.
- At same time, the OBPT broadened the OAR 848 Division 35 Continuing Competence requirements to allow non-clinical categories, including allowance for content on burnout, which also opens the door for outreach opportunities to elementary students or other groups.
- Updates to Minimum Data Set – worked with Federation of State Boards of Physical Therapy and the Oregon Health Authority on the workforce survey in order to connect to national data. Further working with OHA for direct access to survey results to inform policy and planning.
- As continuation of review as result of SB 855, OBPT is evaluating current unnecessary regulatory barriers for our immigrant and refugee foreign-trained applicants.
- Initiated required Diversity and Inclusion training for current PT Board members and staff, including training in implicit bias to facilitate PT Board awareness and “create the proper lens” for policy making.
- Initiated workgroup with all Oregon PT schools to collectively address diversification of the educational pathway. Will also partner with Oregon Health Authority to link to the capture and tracking of Oregon Workforce Data over time.
- Worked with statewide team and Governor’s Appointments Office to develop outreach programming to recruit Board members from underrepresented groups for OBPT and all Oregon Boards & Commissions.
- Developed educational materials in partnership with other groups on the role of the regulatory board in diversifying the PT workforce; co-presented a panel presentation for the Federation of State Boards of Physical Therapy.

CRR Strategic Action Items Identified Going Forward:

The OBPT has added a strategic planning agenda item at each Board meeting to track progress on identified objectives, and for the Board to discuss and actively plan next steps in a continuous, adaptive, public process. The items below have been identified for further discussion, refinement, and scheduling of specific actions.

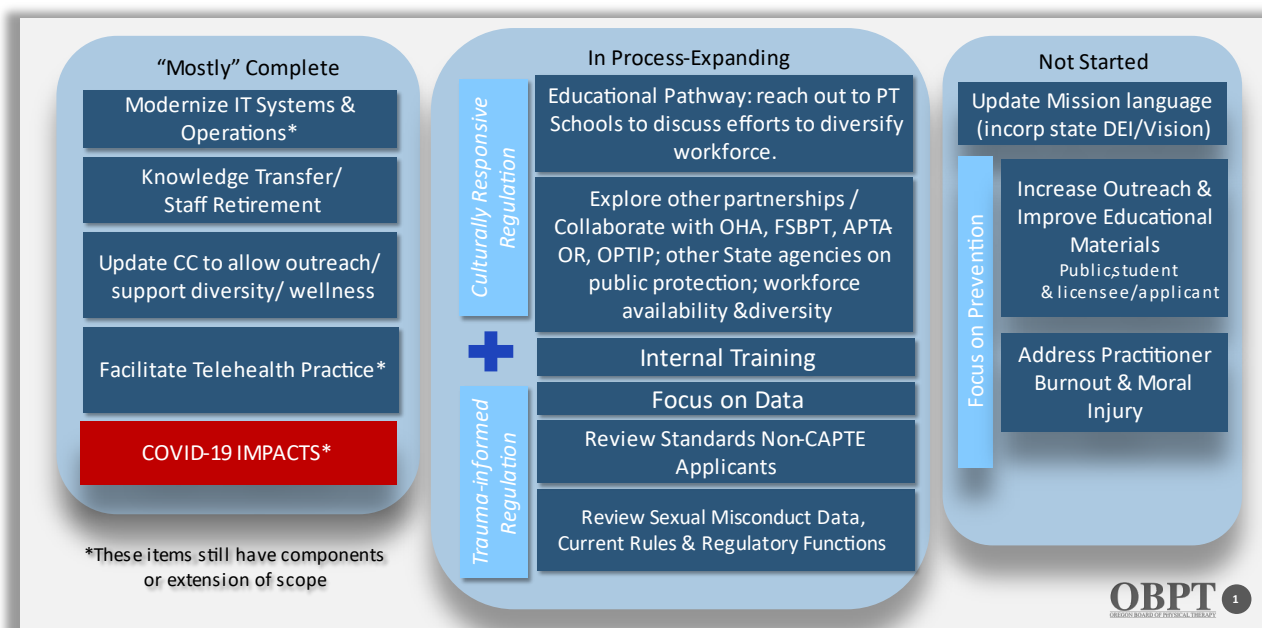
- Continue work with Oregon PT Schools to produce recommendations for the PT Educational Pathway.
 - Locate or develop CC programs supporting licensee outreach to elementary/middle /high school.
 - Aligning school entry requirements for culturally responsive practice.
 - Expand dialog with non-Oregon educational institutions, possibly through partnership with national associations (FSBPT/APTA) or accrediting entity (CAPTE).
- Examine the diversity of the PT Board;

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- Use appointment of public position members to offset the relative lack of overall diversity of professional members while also specifically recruiting professional members from underrepresented groups with each appointment.
 - Evaluate current Board member statutory qualifications to determine if there are barriers to diversity that could be removed.
 - Consider structural means of increasing diversity on the Board via the addition of an advisory member or PT board sub-committee, or other means to help diversify the review of board policy and decision-making.
- Explore how to increase engagement of current licensees from underrepresented groups with the Board, board programs, and policy-making (building trust and inclusion).
 - Explore ways the PT Compact can support diversification of the Oregon PT Workforce; consider outreach to other states to promote utilization of Compact privileges to support traveler workforce augmentation.
 - The Board has the statutory authority to require community service or education as part of the remediation/discipline process; explore use of these “tools” within the disciplinary/remediation process, where appropriate, to build understanding, partnership, and skills to prevent future violations.
 - Link to strategic planning framework of trauma-informed regulation; often overlap of both “lenses”.
 - Develop plan and schedule to evaluate all current regulatory processes (and strategic objectives) through framework of CRR, while also linking to the framework of trauma-informed regulation, as both frameworks are key to analysis and understanding.
 - Increase emphasis on communication, support, and prevention in development of all materials.
 - Review website for readability and accessibility. Create additional support materials in audio/visual formats.

These Strategic Action Items will be further quantified and scheduled, and added to the existing OBPT 2018-2023 strategic priorities, as visualized here:



Oregon Board of Physical Therapy Strategic Planning: Developing Culturally Responsive Regulation

V. Strategic Progress Update: May 2023 Board Meeting

Since the formation of this original document, the State of Oregon published a statewide Diversity, Equity, and Inclusion Action Plan in August of 2021. The OBPT has reviewed the plan and uses it as an additional reference point for developing and implementing actions within the culturally responsive regulatory framework, as well as within the agency itself, as reflected in the Board’s Affirmative Action and Diversity and Inclusion Plan. The Board has mapped current initiatives to the statewide ten strategies roadmap and will continue to use the document to develop and refine future work.



State of Oregon Diversity Equity and Inclusion Action Plan

Ten Strategies

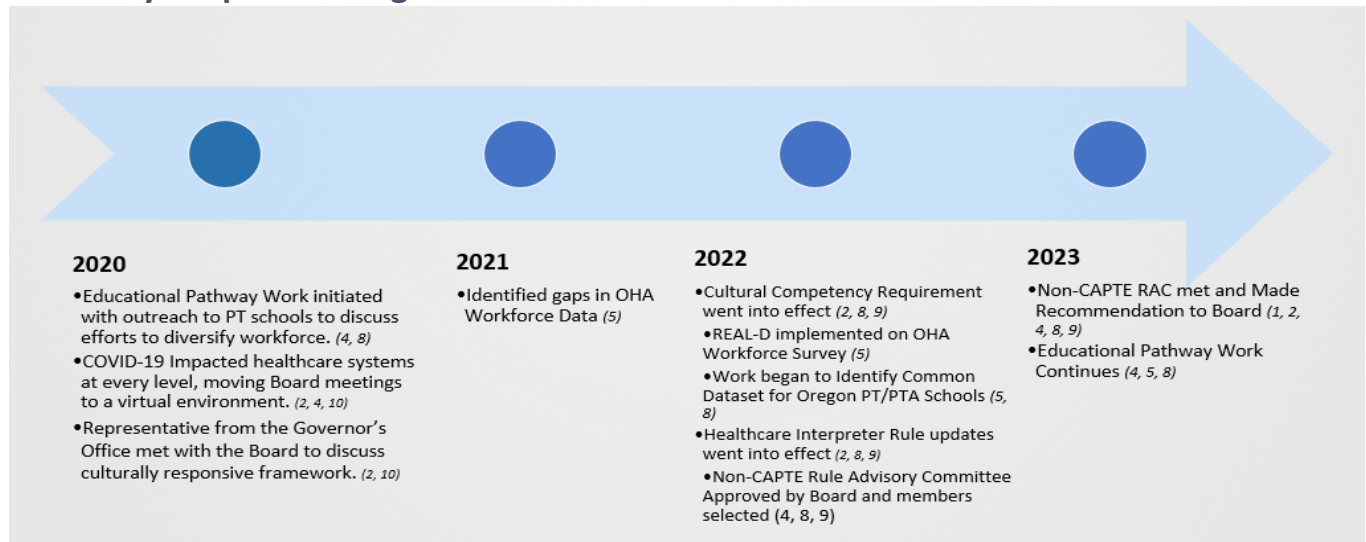
1. Develop Agency-specific Racial Equity Plans
2. Build State Diversity, Equity, and Inclusion Infrastructure
3. Foster Inclusive Communications
4. Strengthen Community Engagement
5. Utilize Disaggregated Data as a Lever for Change
6. Create Equitable Budget & Inclusive Budget Process; Invest in Target Communities
7. Advance Contract Equity and Improve State Procurement Processes
8. Build a More Diverse Workforce and Create an Inclusive Workplace
9. No Tolerance for Racism, Hate, and Discrimination
10. Operate with Urgency, Transparency, and Accountability

At the May 19th, 2023 meeting of the OBPT, the Board reviewed progress to date on all strategic initiatives, including those identified within the CRR framework for the period through 2023. The Board will be performing the next five-year work planning session later this year, as well as documenting in detail the specific performance to plan and achievement of stated objectives and outcomes.

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Strategic Planning: Developing Culturally Responsive Regulation

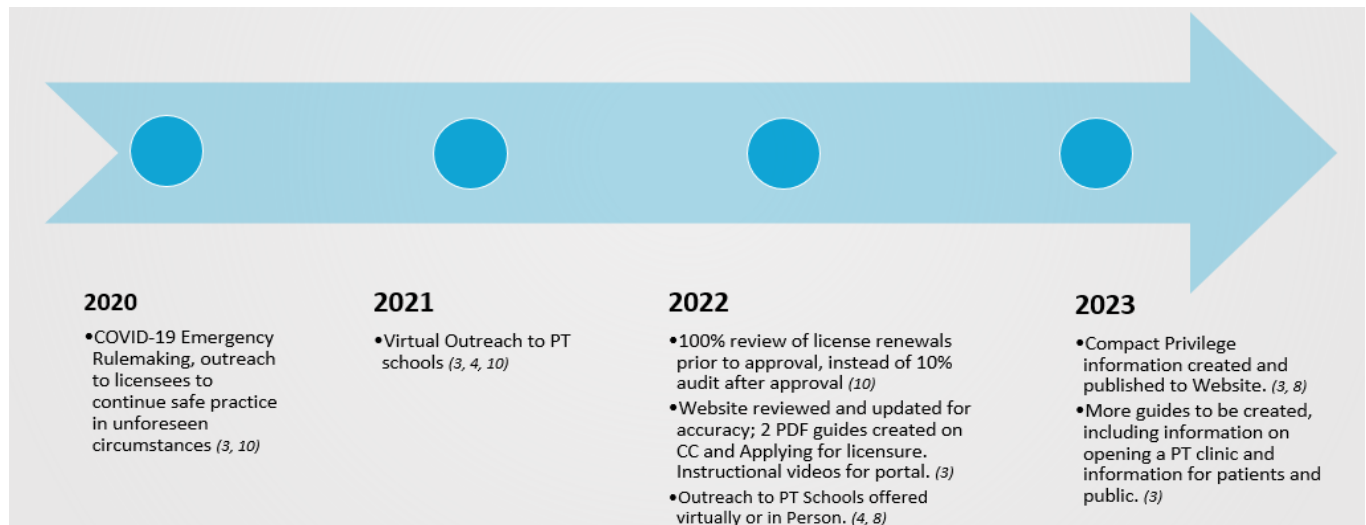
Culturally Responsive Regulation



Trauma Informed Regulation



Focus on Prevention



Oregon Board of Physical Therapy Policy on Application Review/Approval Applicants with Criminal History

Intent: This policy is intended to be administered in the review and processing of initial and renewal applications for licensure.

Purpose: The purpose of the policy is to set benchmarks, relative to an applicant's criminal background history. The benchmarks will be a guide to Board staff, identifying the appropriate level of approval authority necessary to proceed with an application for licensure.

Part I: Failure to Disclose Criminal Background History

If an Applicant fails to disclose prior criminal citation, arrest, charge or conviction or prior licensure action taken in another jurisdiction on the application, and lack of disclosure is discovered during the licensure process or later during a random audit:

- Follow standard procedures, ask applicant for: a written explanation for failure to disclose; a written statement of the events and circumstances surrounding the offense; and copies of all legal documents, court orders, police records, board documents etc.
- Note: In some circumstances, court documents, police records or board documents may no longer be available. If so, the applicant must provide written documentation of their efforts to obtain the documents and the reason why they are no longer available.
- If the applicant provides a complete written explanation and sufficiently provides the requested information in a timely manner and it is determined that the offense:
 - is a one-time offense;
 - is either a misdemeanor, a citation, or is a felony arrest that is closed and did not lead to conviction, and
 - is older than three years; or,
 - is an action taken in another jurisdiction that would not be considered a violation of Oregon statute or rule, or,
 - is a one-time offence that occurred as a minor, and is older than three years;

Then the Board Chair or Board Vice Chair may make the sole decision to proceed with licensure **and issuance of a confidential advisory letter pertaining to the failure to disclose**, or, depending on the circumstances of the incident, may choose to have the entire Board review the application, **along with an investigative report and documentation at their next scheduled meeting.**

- All other applications with non-disclosure, along with an investigative report and documentation, will be brought before the Board for their review, at their next scheduled meeting.

**Oregon Board of Physical Therapy
Policy on Application Review/Approval
Applicants with Criminal History**

Part II: Applicant Discloses Criminal Background History

If an Applicant does disclose prior criminal citation, arrest, charge or conviction, or prior licensure action taken in another jurisdiction on the application:

- Follow standard procedures, ask applicant for: a written statement of the events and circumstances surrounding the offense and copies of all legal documents, court orders, and police records, board documents etc.
- Note: In some circumstances court documents, police records or board documents may no longer be available. If so, the applicant must provide written documentation of their efforts to obtain the documents and the reason why they are no longer available.
- If the applicant provides a complete written explanation and sufficiently provides any additional requested information in a timely manner, and the offense:
 - is a one-time offense;
 - is either a misdemeanor, a citation, or is a felony arrest that is closed and did not lead to conviction; and
 - is older than three years: or
 - is an action taken in another jurisdiction that would not be considered a violation of Oregon statute or rule, or,
 - is a one-time offence that occurred as a minor, and is older than three years;

Then, If the results of a background verification are consistent with the disclosures and there are no additional offenses found, the Executive Director or Clinical Advisor/Investigator may make the decision to proceed with licensure.

- All other applications disclosing prior arrests and citations, along with an investigative report and documentation, will be brought before the Board for their review, at their next scheduled meeting.

82nd OREGON LEGISLATIVE ASSEMBLY--2023 Regular Session

FINAL TRACKED BILL REPORT Updated 7/20/2023.

Board staff were tracking and previously reported on 33 bills during the 2023 session. The four bills below are the only ones tracked that have been enrolled. The full text of the enrolled bills is linked and summarized below:

ENROLLED BILLS

HB 2618 – Relating to school-based health practitioners; declaring an emergency.

<https://olis.oregonlegislature.gov/liz/2023R1/Downloads/MeasureDocument/HB2618/Enrolled>

Directs DOE to conduct a study to identify the best methodology for determining the appropriate number of students on a workload for a school-based health practitioner who is a speech-language pathologist, occupational therapist or **physical therapist**. Report to legislative assembly no later than January 5th, 2024. Enacted on passage.

HB 2240 -- Relating to requirements to use health care interpreters; declaring an emergency.

<https://olis.oregonlegislature.gov/liz/2023R1/Downloads/MeasureDocument/HB2240/Enrolled>

Adds clarification that “health care provider” does not include any individual employed or under contract of a school district, charter school or educational service district. Enacted on passage.

HB 2805—Relating to Public Meetings.

<https://olis.oregonlegislature.gov/liz/2023R1/Downloads/MeasureDocument/HB2805/Enrolled>

Makes clarifications to existing law related to public meetings; directs Oregon Ethics Commission (OAC) to develop training on public meetings; mandates or encourages board members to attend training; grants oversight authority of public meetings to OEC and establishes complaint process and penalties. Effective 91 days after sine die.

SB 11 – Requiring certain executive department boards or commissions that conduct public meetings through electronic means to records and promptly publish recording on website or hosting service.

<https://olis.oregonlegislature.gov/liz/2023R1/Downloads/MeasureDocument/SB11/Enrolled>

Requires Board and Commissions of the Executive branch whose members are subject to Senate confirmation, when the Board meets via video means record and promptly publish the recording on a publicly available website so that the public may watch the meeting, or if meeting by phone, record and post recording so the public may listen to the meeting. Effective January 1, 2024.

| Best Practices Criteria | Yes | No |
|---|--------------|--------------|
| 1. Executive Director’s performance expectations are current. | | |
| 2. Executive Director receives annual performance feedback. | | |
| 3. The agency’s mission and high-level goals are current and applicable. | | |
| 4. The board reviews annual performance progress report.* | | |
| 5. The board is appropriately involved in review of agency’s key communications. | | |
| 6. The board is appropriately involved in policy-making activities. | | |
| 7. The agency’s budget aligns with mission and goals. | | |
| 8. The board reviews all proposed budgets. | | |
| 9. The board periodically reviews key financial information and audit findings. | | |
| 10. The board is appropriately accounting for resources. | | |
| 11. The agency adheres to accounting rules and other relevant financial controls. | | |
| 12. Board members act in accordance with their roles and public representatives. | | |
| 13. The board coordinates with others where responsibilities and interests overlap. | | |
| 14. The board members identify and attend appropriate training sessions. | | |
| 15. The board reviews its management practices to ensure best practices are utilized. | | |
| Total | 0 | 0 |
| Percentage of Total | 0.00% | 0.00% |

*As a semi-independent agency, the OBPT performance metrics are reported in the ED and Governor's Reports.

Board Assessment Resource (BAR) Questions

All

Board Performance

Outreach & Education

Licensure

Complaint Resolution

Filter:

Board Performance

Planning

1. Does the board participate in a planning process?
2. Does the board ensure that its decisions are consistent with the plan, mission, and vision?
3. Does the plan consider stakeholder feedback, external trends, Strengths Weakness Opportunities Threats (SWOT), or similar analysis?
4. Does the board regularly conduct a review of the plan and document and report progress on plan objectives?
5. Does the board publish the results of the plan?

Training

1. Does the board require training for new board members?
2. Does the board require ongoing training for all board members?
3. Does the board review and update training content periodically to ensure it is tied to its mission, vision, goals, and objectives?
4. Does the board keep records of each board member's training?
5. Does the board identify and encourage external training opportunities?

Reviewing Relevant Documents

1. Does the board periodically review relevant statutes, regulations, and other guidance?
2. Does the board regularly solicit input on statutes, regulations, and other relevant guidance?
3. Does the board regularly provide recommendations to facilitate necessary changes to statute, regulations, and other relevant guidance?
4. Does the board document the results of the review?

Outreach & Education

Soliciting Feedback

1. Does the board identify and periodically review organization stakeholders?
2. Does the board actively solicit feedback from stakeholders?
3. Does the board receive feedback through a variety of means?
4. Does the board use feedback about board performance to implement improvement?

Proactively Providing Information

1. Does the board actively disseminate educational information to stakeholders through a variety of means?
2. Does the board determine if education and outreach programs reach identified stakeholders?
3. Does the board solicit and review feedback to improve educational outreach?
4. Does the board use feedback about educational outreach to implement broader programmatic improvements?

Responding to Stakeholders

1. Does the board respond to its stakeholders in a consistent, accurate, and timely manner?
2. Does the board have a clear process in place to respond to stakeholders?
3. Does the board measure responsiveness*? (*Responsiveness includes consistency, accuracy and timeliness)
4. Does the board solicit and review feedback on responses to improve customer service?
5. Does the board use feedback on customer service to implement broader programmatic improvements?

Licensure

Qualifications of Providers

1. Does the board evaluate the applicant against a set of standards to determine eligibility for licensure?
2. Does the board regularly review and evaluate the standards for licensure?
3. Does the board's statutes, regulations, and other relevant guidance support a risk-based approach to continuing competence to facilitate healthy practice?
4. Does the board regularly review and evaluate its requirements to facilitate licensure portability?
5. Does the board make changes as a result of the reviews?

Workforce Data

1. Does the board (or jurisdiction) collect physical therapy workforce data?
2. Does the board (or jurisdiction) collect a standard dataset?

3. Is the collection mandatory at time of licensure renewal?

4. Is the data securely stored?

5. Does the data inform board decision-making and tie to the board's larger plan?

Verification

1. Does the board have a publicly available mechanism to verify an individual's licensure status?

2. Does the board educate stakeholders that verification of licensure is available?

3. Is the verification updated in real-time and by the board?

4. Does the verification include relevant licensee information including disciplinary history?

Complaint Resolution

Publication

1. Does the board publish (the results of) complaint resolutions?

2. Is complaint resolution information on the individual licensee available online?

3. Is complaint resolution information on the individual licensee updated in real-time?

4. Does the board educate stakeholders that complaint resolution information is available?

5. Is complaint resolution information on the individual licensee comprehensive (e.g., includes order or public documents)?

Employs Consistent Process

1. Does the board have a standardized process for board actions?

2. Does the board maintain a historical record of decisions related to violations?

3. Does the board reference a historical record of decisions related to violations?

4. Is the process for determining board actions consistently used?

5. Is the process for determining board actions used transparent to licensees and the public?

Evaluation of Data

1. Does the board track trends in board actions?

2. Does the board use the data to evaluate trends?

3. Does the board use the data to determine educational and outreach initiatives?

4. Does the board use the data to tie into the board's larger plan?