

# AOTA Diversity, Equity, and Inclusion Strategic Plan Report

June 2021

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## Message From the AOTA DEI Task Force Chair

It is with sincere gratitude that the AOTA DEI Task Force presents its report and a strategic plan for advancing diversity, equity, and inclusion in AOTA and the occupational therapy profession. Our work began in March of 2020 as an important step in fostering transformation toward an inclusive organization that is accessible to all practitioners, students, and occupational therapy professionals.

Our work began with research, analysis, and engagement of faculty, students, and practitioners through surveys and interviews, and led to creating overarching goals and action items that provide a plan for AOTA to implement and reference to achieve long-lasting accessibility and inclusivity.

The work of the Task Force was undertaken in an environment of escalating racial tensions within our nation and global political hyperpolarization. AOTA has more than 65,000 practitioner and student members with varying views and opinions. We received feedback, support, and pushback from AOTA members with varying perspectives, some even suggesting that DEI is not an issue. However, the Task Force focused on how to address the needs with the scope of AOTA as a whole, while honoring the perspective of all members. We recognize this is a challenge in itself.

The plan presented here is imperfect as it stands. It is a working plan that needs to continue. We request AOTA to drive steady momentum toward inclusive outcomes so that the needs of everyone will be realized. Thank you.

Adrienne Smiley, EdD, OTD, OTR/L

## Message From the AOTA President

“As an inclusive profession” begins the aspirational AOTA Vision 2025. This statement elevates the opportunity for and assigns responsibility to the occupational therapy profession and the American Occupational Therapy Association to authentically serve others with positive regard for diversity and equitable participation in everyday life. Within our professional community, this opening phrase rings as buzzwords, rhetoric and platitudes, and triggers for some individuals and groups. For the current AOTA Board of Directors, these words stand as a call to action turning the “talk” into listening, understanding, and strategically driving action focused on systemic and sustainable change.

Inclusion involves action to reshape attitudes and thinking of people, change environmental and organizational culture, and construct a welcoming and participatory climate where individuals or groups are valued and respected for diverse perspectives and experiences as well as common ground shared with others. Inclusion must be integral to systemic review and structural redesign of policies, procedures, processes, and services of the organizational and governance levels of the American Occupational Therapy Association. The outcome of our systemic change efforts will impact occupational therapy education, practice, research, and policy.

As occupational therapy and AOTA work to actualize “as an inclusive profession,” please consider the following: First, talking and listening are action steps crucial to understanding and change. Second, we must “walk the talk” with urgency while recognizing patience as a necessary tool in our culture shift. Third, humility and care for each other in this reconstruction journey can support change as we continue uncomfortable conversations, propose different approaches, and implement change steps. Finally, embrace self-reflection and self-work, professional reframing, organizational rethinking, and systemic reconstructing as a collective growth mindset and action-focused path forward in service to others.

Wendy Hildenbrand, PhD, MPH, OTR/L, FAOTA

### **Message From the AOTA Executive Director**

Diversity, equity, and inclusion (DEI) are essential elements of the occupational therapy profession and AOTA. In October 2019, the AOTA Board and staff began a conversation on steps we needed to take to move from words in our Vision 2025 statement to real strategies and actions. In looking at what made some organizations successful in their DEI efforts, we identified the need for a strategy and plans to build DEI efforts across AOTA. In February 2020, the Board took the important action of creating a special DEI Task Force of members representing many different backgrounds, life experiences, and professional experiences to create a strategic plan to guide AOTA’s DEI initiatives.

This was challenging but vital work, and we are grateful to the dedicated members who shared their perspectives, experiences, and ideas to create AOTA’s first DEI Strategic Plan.

But this is only the beginning. AOTA is committed to moving these strategic concepts into action and outcomes that will make AOTA an inclusive, welcoming organization that is strengthened by the diversity and engagement of our members. We also realize this is our first DEI plan and we are also committed to building on and updating it.

Finally, we recognize that diversity, equity, and inclusion cannot reside in one department or area within AOTA or the profession. The initiatives we will undertake in the months and years ahead will be woven into all areas of AOTA and will be part of the fabric of AOTA and our mission to support the occupational therapy profession and the communities served by the profession.

Sherry Keramidas, PhD, FASAE, CAE

### **About AOTA**

Established in 1917, the American Occupational Therapy Association (AOTA) is the national professional association which intends to represent the interests and concerns of more than 220,000 occupational therapy

practitioners and students in the U.S. and to improve the quality of occupational therapy services. AOTA work advances occupational therapy practice, education, and research.

## Overview

Diversity, equity, inclusion (DEI); and justice are among the most challenging issues facing our society, our communities, our organizations, and each of us. These are not new issues, but we realize today that our actions in the past failed to truly confront and address these challenges. We must take bold new steps to become an organization and profession that embraces DEI and justice for all members, professionals, students, clients, and underrepresented and/or marginalized individuals or groups. This is a truth for AOTA and for the occupational therapy profession in the United States throughout much of its 100+ year history, and addressing this reality led AOTA to take action to develop a plan for effecting change. During its first 100 years, AOTA attempted some bold steps toward fostering DEI. As a profession that was primarily female, AOTA diligently worked to address roadblocks to education and training, professional recognition, patient access, and equitable payment. In the 1960s, seeing Black professional colleagues who were not permitted to attend meetings with White colleagues, AOTA was among the first organizations to take a stand against holding meetings in locations supporting segregation, a position that many other health professions followed. AOTA actively engaged in advocacy efforts that led to the Americans with Disabilities Act of 1990. More recently AOTA has championed efforts for the Allied Health Workforce Diversity Act (2021). The Allied Health Workforce Diversity Act recognizes that it is vital to ensure that the makeup of the health care workforce in the United States evolves to mirror the makeup of the population. Having a more diverse workforce helps close the gap on provider shortages, while improving the ability of the health care workforce to effectively address the health care needs of all Americans.

AOTA's Vision 2025 prominently places DEI as a driver of our strategic directions. One of the five pillars upholding Vision 2025 states: "we are intentionally inclusive and equitable and embrace diversity in all its forms." The focus on DEI was interwoven as a key theme in AOTA's strategic framework revisions in 2019 and in the most recent updates in 2021. The 2020 updates of the Occupational Therapy Practice Framework (4<sup>th</sup> ed.), and the AOTA Code of Ethics emphasize the complexities of clients' backgrounds and life experiences with greater attention to cultural humility and occupational justice, equity, and inclusion.

On May 31, 2020, AOTA's Board of Directors issued a Statement on Justice and Systemic Racism condemning racism and committing to finding new and effective solutions to enhance diversity, equity, and inclusion within our Association, our profession, and our society.

In June and July 2020, the AOTA Board of Directors hosted a series of listening sessions, *Be Heard, We're Listening*, to provide occupational therapy practitioners and students an opportunity to share their reactions to the societal issues and unrest, and their personal experiences with racism. These sessions led to developing toolkits for occupational therapy practitioners, an effort that will be ongoing in the coming years. The redesign of AOTA's website and communications, efforts that are currently underway, will incorporate what we learned from those sessions, as well as the recommendations contained in this report to shape our approach and our content.

AOTA acknowledges that our efforts have not been sufficient. Indeed, many facets of DEI are lacking in our current organizational and governance structures, policies, programs, and services. AOTA recognizes that real progress towards DEI will come with an integrated strategy, committed leadership, and members' engagement. To that end, in February 2020, the AOTA Board of Directors established a Diversity, Equity, and Inclusion Task Force (Task Force) to develop a strategic plan to guide short- and mid-term goals, advance DEI

within AOTA and the occupational therapy profession, and submit a final report with recommendations to the Board by June 2021.

In March of 2020 the Board opened the call for volunteers to all AOTA members to form the Task Force. More than 180 expressions of interest were processed, and the 20 members selected to serve on the Task Force represented a range of demographics, life experiences, and perspectives.

## About the Task Force

The work of the Task Force began in July 2020 during a period of global political hyperpolarization and escalating tensions related to calls to address societal injustices and end systemic racism within the U.S. and around the globe. Throughout its work, the Task Force received constructive input from occupational therapy professionals and students of varying perspectives, some even suggesting that DEI is not an issue for the profession. The Task Force worked diligently to gather and listen to the perspectives of all members but with an understanding that proactive steps will be required to effectively address the challenges of making AOTA and the profession inclusive, equitable, diversified, and socially just. The Task Force approached its charge by examining the directive from the AOTA Board of Directors to broadly and strategically approach the construction of a DEI plan. The charge focused on AOTA and the profession over the next 3 to 5 years.

The Task Force journey and workplan included a kickoff meeting in July with a series of brainstorming sessions and monthly virtual meetings. The Task Force initiated its work by forming three working groups focused on understanding DEI needs and pain points for three key stakeholder groups: occupational therapist (OT)/occupational therapy assistant (OTA) practitioners, OT/OTA students and academicians, and the AOTA organization. From September 2020 through March 2021, the work focused on data gathering, analysis, and engagement of faculty, students, and practitioners. Surveys of members, staff, and AOTA committees and commissions were completed. Additionally, the Task Force conducted member engagement sessions.

The DEI Task Force recognizes that this plan is a starting point. We entrust the AOTA Board of Directors to receive these recommendations and continue this work. We further entrust AOTA's leadership to drive steady momentum toward inclusive outcomes so that our members will feel authentically valued and supported in their practice of occupational therapy.

## DEI Strategic Plan

### Vision Statement

AOTA is committed to creating an environment where all people within our professional community are valued and able to give their best in the communities where they live and work. AOTA strives to recognize and uplift the diversity of our profession and is committed to creating opportunities to foster inclusivity, participation, and representation. We will act with intention and live our values to be inclusive, equitable, just, and accountable in this work.

### DEI Values and Behaviors

The Task Force identified three underlying values and behaviors that are essential to this plan.

**Inclusiveness:** Encouraging active involvement of everyone in the community and making it easy for people to be involved.

- Seeking to understand viewpoints that are not our own.

- Challenging behaviors that create exclusion.

**Accountability:** Taking ownership by acknowledging and assuming responsibility for actions, decisions, and policies. Providing clarity on what we are being held accountable for.

- Having transparency and openness.
- Acknowledging shortcomings and seeking out support when needed.
- Aligning our actions with our stated values.

**Authenticity:** Speaking one's truth, being fearless in who you are.

- Listening to and respecting others' truth.
- Behaving according to our values.
- Leading by example.

## Strategic Focus Areas

Guided by the consultants supporting this project, the Task Force had initial brainstorming conversations focused on challenges and opportunities for faculty and students, practitioners and professionals, and for AOTA. The Task Force considered which DEI challenges could be addressed within the next 3 to 5 years and where subsequent action could be focused. From this work, Task Force identified four broad strategic areas of focus:

1. Governance and Accountability
2. Education and Awareness
3. Diversifying the Profession
4. Language and Communication

## Goals and Actions

### Governance and Accountability

**Goal 1:** Ensure that AOTA governance structure, policies, processes, and practices are inclusive, free of bias, and assure diversity of background, lived experiences, and perspectives among all member volunteer bodies and the Association as a whole.

**Action 1.1:** Establish a DEI committee to inform AOTA DEI strategy and serve as an advisor for Association activities.

**Action 1.2:** Modernize existing AOTA governance structures, policies, practices, procedures, programs, and services to incorporate and communicate our DEI vision and values.

**Action 1.3:** Identify and address barriers to participating in volunteer leadership roles within the Association.

### Education and Awareness

**Goal 2:** Educate and train occupational therapy stakeholders (e.g., educators, practitioners, students, accreditors, volunteers, and AOTA staff) about DEI, the inherent link with the principles of the profession, and the mission and vision of AOTA.

**Action 2.1:** Curate accessible content and resources for academic preparation for OT and OTA students.

**Action 2.2:** Curate accessible content for continuing education/professional development for practitioners, educators, students, and AOTA staff.

**Action 2.3:** Promote adoption of DEI requirements as part of accreditation, licensure, and certification.

**Action 2.4:** Infuse intersectional DEI content into AOTA events and educational programs and materials.

**Action 2.5:** Identify and disseminate relevant research studies that elevate awareness and advancement of DEI-related topics.

### **Diversifying the Profession**

**Goal 3:** Expand representation across all intersections of diversity within the occupational therapy profession.

**Action 3.1:** Enhance awareness of and opportunities for occupational therapy careers within underrepresented populations.

**Action 3.2:** Identify and address barriers to admission to and successful completion of OT and OTA programs, including but not limited to biases, prejudices, and economic inequities.

**Action 3.3:** Examine experiential differences and barriers in employment for occupational therapy professionals and students from diverse backgrounds, and determine approaches to support our occupational therapy community.

### **Language and Communication**

**Goal 4:** Promote a shared understanding of the dimensions and terminology of DEI among AOTA members, the profession, and with other related professions.

**Action 4.1:** Build, regularly update, and consistently communicate the lexicon of terms related to DEI that is relevant to our membership.

**Action 4.2:** Collect and transparently share information to AOTA membership and our community about our DEI efforts.

**Action 4.3:** Apply a DEI lens to all AOTA communications.

**Action 4.4:** Create collaborations with agencies and organizations to understand the shifting demographic composition of the profession.

### **Resources**

1. [Occupational Therapy's Commitment to Diversity, Equity, and Inclusion | American Journal of Occupational Therapy \(aota.org\)](#)
2. [Occupational Therapy Practice Framework, & Process \(4<sup>th</sup> Ed.\) | American Journal of Occupational Therapy \(aota.org\)](#)

3. [AOTA Occupational Therapy Code of Ethics / American Journal of Occupational Therapy \(aota.org\)](#)
4. [AOTA Be Heard—We're Listening Session Transcript 6-18-2020](#)
5. [AOTA Be Heard—We're Listening Session for Educators Transcript 7-23-2020](#)
6. [AOTA Be Heard—We're Listening Session for Practitioners Transcript 7-16-2020](#)

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## APPENDIX

The AOTA DEI Strategic Plan is a culmination of the hard work and dedication of the DEI Task Force and its rigorous process of data collection from numerous sectors of the AOTA community. As part of this process, the Task Force held focus groups with AOTA members to discuss how to promote DEI across AOTA, the OT profession, and occupational therapy academic programs.

Below is a compilation of proposed actions generated by focus group participants who shared their insights and perspectives on how to transform AOTA and the profession to be equitable, welcoming, and inclusive of diverse members. These ideas will be forwarded to the new AOTA DEI Committee and shared with other AOTA commissions, committees, and staff for review and consideration.

### Recurring Themes for Action

- ★ Commitment & Ubiquitous Representation
- ★ Training, Guidance, & Mentorship
- ★ Support & Incentives, & Resources
- ★ Inclusivity & Safety
- ★ Social Presence & Outreach

### Action Strategies

#### Building Awareness

- Elevate the profile of diverse groups on aota.org and at AOTA conferences.
- Make aota.org more student friendly; enhance visibility of resources, opportunities, scholarships, clubs, caucuses (e.g., NBOTC, MDI Network), finding mentors, certified programs, and admission requirements.
- Create a webpage designed specifically for the different routes and tracks to enter the profession.
- Feature and promote volunteers from diverse backgrounds online and in publications.
- Present TEDx Talks and other social media platforms to educate students about OT.
- Provide OT education that is clear and based in historical fact.
- Provide more awareness on anti-racism principles, as they supersede cultural awareness in many ways.

#### Pipeline, Recruitment, & Retention

- Allocate resources dedicated to intentionally recruiting diverse individuals.
- Develop a pipeline of diverse leaders.
- Develop recruitment material depicting diverse populations.
- Target middle and high schoolers for recruitment into the profession, especially via social media.
- Utilize nontraditional and multicultural marketing to advertise OT and recruit diverse students.
- Add to program applications the question, “What type of diversity do you bring to the program?” to identify students in underrepresented groups and the level of understanding of diversity among White students.

#### Research, Training, & Education

- Create practice-related videos with DEI content, including culture and religion.
- Provide leadership development opportunities.
- Publish qualitative research studies in *AJOT*.

- Connect research on DEI concepts to practice.
- Design curricula, training, and continuing education modules on diversity, bias, racism, discrimination, occupational justice, cultural humility, and cultural sensitivity.
- Develop guidelines around preventing curriculum and teaching bias.
- Increase funding for qualitative research (not just quantitative research).
- Provide diversity training and courses for teachers/faculty.

### **Access & Support**

- Create a volunteer hotline to connect people interested in OT with practitioners.
- Create resources about cultures in limited resources areas.
- Develop a sliding scale for membership dues, with people from marginalized groups paying nothing.
- Meet the needs of older practitioners (mid- and senior-career professionals); provide programs for senior therapists.
- Tailor membership to fit the needs and budgets of practitioners.
- Offer discounts for employers paying for AOTA membership.
- Increase membership benefits without increasing dues.
- Make AOTA conferences more affordable to students.
- Provide scholarships for volunteers; improve accessibility for volunteers.
- Ensure accommodations for attendees with disabilities at AOTA conferences.
- Offer intern or mentoring opportunities with AOTA leaders.
- Provide support for educators to understand and implement strategies that make their teaching/curricula more equitable and inclusive.
- Compensate individuals who provide DEI training.
- Create DEI-focused grants.
- Offer a DEI scholarship.
- Educate practitioners on dealing with clients with no insurance and with other access issues.
- Help international students navigate the certification and licensing process.
- Make DEI-related webinars free to all.
- Fund AOTA DEI caucus groups.
- Offer credit for participation in focus groups/discussion boards/diversity training.
- Improve accessibility for students with disabilities.
- Provide guidelines for reasonable accommodations for obtaining employment as an occupational therapist and for fieldwork placements.
- Mentor programs for new diverse faculty.
- Mentor programs for diverse groups to help with research.
- Create a mentor-matching program for first-year students with senior students; include a mixed culture buddy system (mentor).
- Offer scholarships to students who are underserved or underrepresented.
- Aid people with disabilities to apply for and gain acceptance into programs and to obtain employment.
- Teach and challenge faculty and fieldwork coordinators to stand up for and intervene more for minority students.

### **Infrastructure & Institutional Commitment**

- Create a formal position at AOTA leadership to ensure DEI accountability on decisions made by AOTA.
- Create an AOTA department dedicated to accessibility; create department to deal with DEI issues.
- Establish a permanent DEI committee.

- Increase diversity in AOTA leadership so people feel welcome.
- Seek practitioners from the disability community for leadership positions.
- Confront membership at the state level.
- Embed OT consultants in schools to help combat DEI offences and incidents.

### **Diversification & Representation**

- Diversify at all AOTA levels; embed DEI in everything.
- AOTA leadership must reflect the diversity in the profession involving academicians, practitioners, and students.
- AOTA Code of Ethics should reflect more specific stances on discrimination and racism.
- AOTA position criteria should be more inclusive.
- Have more multicultural representation on AOTA website with better pictures.
- Have more portrayals of members in the profession who have a disability.
- Collect diversity-related demographic data at the time of AOTA membership and renewal.
- Diversify to a greater degree presenters at AOTA and state conferences.
- Elevate voices and stories of practitioners in the disability community.
- Involve people from various backgrounds when developing texts for publications (e.g., recruitment case studies).
- Provide more diverse representation in educational materials.
- Make the admissions process more equitable for students from different backgrounds, and continue to support them while they are in the programs.
- Be accountable in diversifying faculty and student populations.

### **Member Engagement**

- Create regular platforms and spaces to continue dialogue about DEI practices and topics/issues of diversity.
- Hold more listening-type sessions to increase engagement with students and practitioners and create and enable feelings of inclusion.
- Create more opportunities for live engagement outside of conference.
- Create space at AOTA conference for diversity groups.
- Reach out to and involve people who are doing interesting things.
- Ensure in-person events are accessible virtually for people who are unable to travel.
- Establish an AOTA corps of volunteers (people want to volunteer but are untapped).
- Increase the ways in which people can get involved with AOTA.
- Reduce student membership cost to help increase membership and student engagement.
- Teach student members how to fully utilize AOTA membership to encourage retention after graduation.
- Take advantage of members with specific skills instead of outside resources.
- Develop a marketing campaign using social media to get people involved.

### **Collaboration**

- Collaborate with COTAD, MDI, NBCOT®, WFOT, and state associations.
- Establish a DEI committee in each state, collaborating and working together to put systems in place/consistency.
- Engage our allies: SLPs, PTs, and teachers/professors.

- Have more involvement with national initiatives, national groups, civil/human rights organizations, unions, allied health, and health care associations.
- Push school involvement with AOTA.
- Have more community-building opportunities that are visible, physical, and interactive.