

WFOT Congress 2026

9-12 FEBRUARY

BANGKOK, THAILAND

Ideas to Impact:

Educating OTs with
Business Brilliance for
Resilient Community Solutions

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Background

Presentation
Tables, Figures, &
Literature Cited



No financial disclosures



Background



THERA TREE
PEDIATRIC THERAPY SERVICES
Growing Minds, Bodies, & Spirits



Background

Practice Owners



*"I find the most employees especially new grads **don't have a clue** what the **financial requirements** are for a business to stay **viable**... asking for **astronomical** salaries that are well above what a company collects for the services provided."*



*"We have a **very difficult** time with their salary **expectations** and job **performance**."*



*"Curriculum seemed to **lack intrapreneurial** topics."*



*"**Complaining** about policies (rules/policies are **required** in any business)"*



*"I do **not** think new graduates have an **accurate picture** of the **real world**. They expect higher salaries and want to work less."*

Needs Assessment

Literature

“**Addressing** the needs of **private practitioners** will ultimately increase the types of services **clients** can **access** in a time of changing health care delivery” (Coppard et al., 2018)

“We identified that there was a **gap** in interprofessional **leadership** in healthcare” (Jacobs, 2023)

“There is a need for entrepreneurship in OT practice, but **few** [OTPs] **initiate entrepreneurship** opportunities. [...] [OTPs & OTSs] **were not taught** the essentials for starting a business” (Spence, 2023).



“The **demand** for OT services has been **increasing** and will continue to increase” (Smith, 2022).

“**Strategic** and ongoing **planning** is needed to maintain a successful business [...] I **don't** think our **OT programs** are **preparing** our **students at all...**” (Abando et al., 2024)

“**Students must be equipped** with entrepreneurial skills and business acumen. [...] Entrepreneurship is a requisite for the [OT] profession. [...] **Entrepreneurship** can be **nurtured** through **curriculum** delivery and experiential learning...” (Cade, 2023)

Needs Assessment

Business Components

Targeted vs Actual Learning Mapped to Bloom's Cognitive Domain



Accreditation Council for Occupational Therapy Education

	Quality Management & Improvement			Business Aspects of Practice						Evolving Service Delivery Models			Supervision of Personnel		
2023	B.4.8			B.4.4.						B.4.7.			B.4.9.		
2018	B.5.7.			B.5.3. ; B.7.5. ; B.4.29.						B.5.6.			B.5.8.		
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
	Determine Needs	Admin Changes	Quality Changes	Evaluation Models	Business Plans	Strategic Plans	Liability	Finance Mgt	Reimbursement	Grants	Service Delivery	Promote	Form Mgt Staff	Supervise Staff	Staff Develop
	Quality			Business			Finance			Promote		Personnel			

Needs Assessment

Business Components

Targeted vs Actual Learning Mapped to Bloom's Cognitive Domain

Bloom's Cognitive Domain	Create									★					
	Evaluate		★	★	★	★	★		★						
	Analyze														★
	Apply	★									★	★	★	★	
	Understand							★		★					
	Remember														
	None														
★ ACOTE (n=78)	Determine Needs	Admin Changes	Quality Changes	Evaluation Models	Business Plans	Strategic Plans	Liability	Finance Mgt	Reimbursement	Grants	Service Delivery	Promote	Form Mgt Staff	Supervise Staff	Staff Develop
	Quality			Business			Finance			Promote	Personnel				

Needs Assessment

Business Components

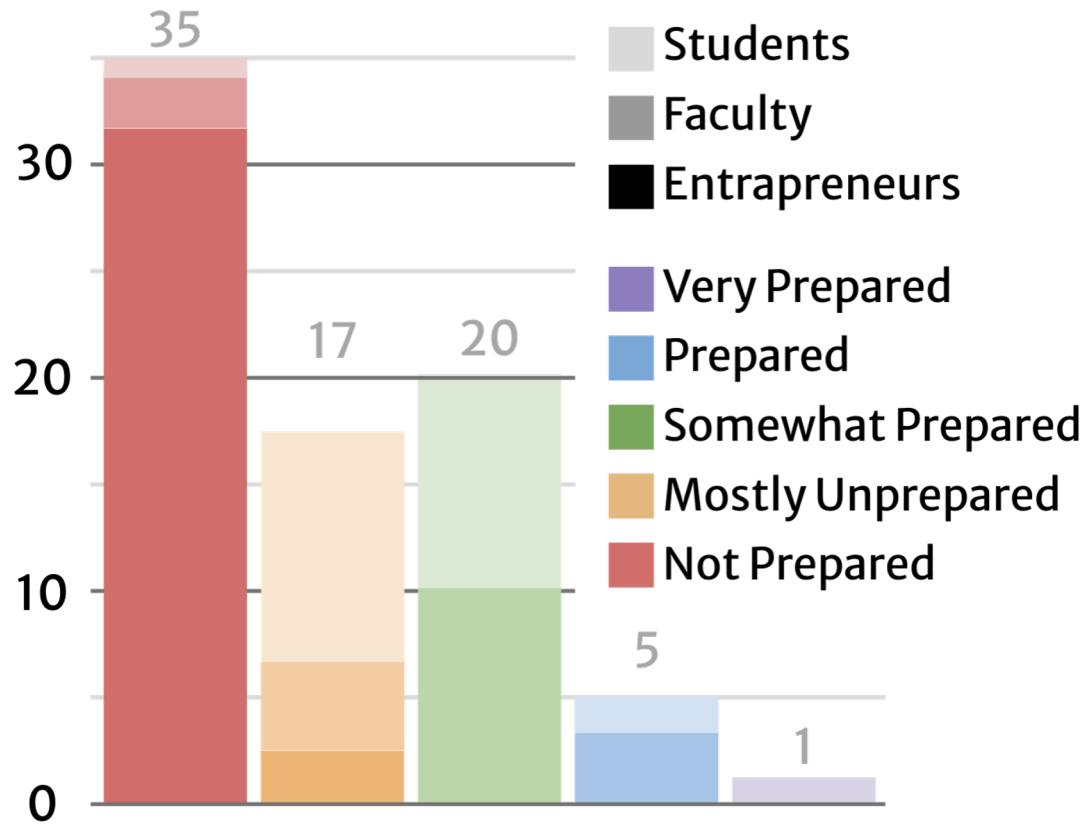
Targeted vs Actual Learning Mapped to Bloom's Cognitive Domain

Bloom's Cognitive Domain	Create									★					
	Evaluate		★	★	★	★	★		★						
Analyze															★
Apply	★										★	★	★	★	
Understand	■			■			★		★		■				
Remember															
None		■	■		■	■		■	■	■		■	■	■	■
★ ACOTE	Determine Needs	Admin Changes	Quality Changes	Evaluation Models	Business Plans	Strategic Plans	Liability	Finance Mgt	Reimbursement	Grants	Service Delivery	Promote	Form Mgt Staff	Supervise Staff	Staff Develop
■ Respondents (n=78)	Quality			Business			Finance			Promote	Personnel				

Needs Assessment

Business Components

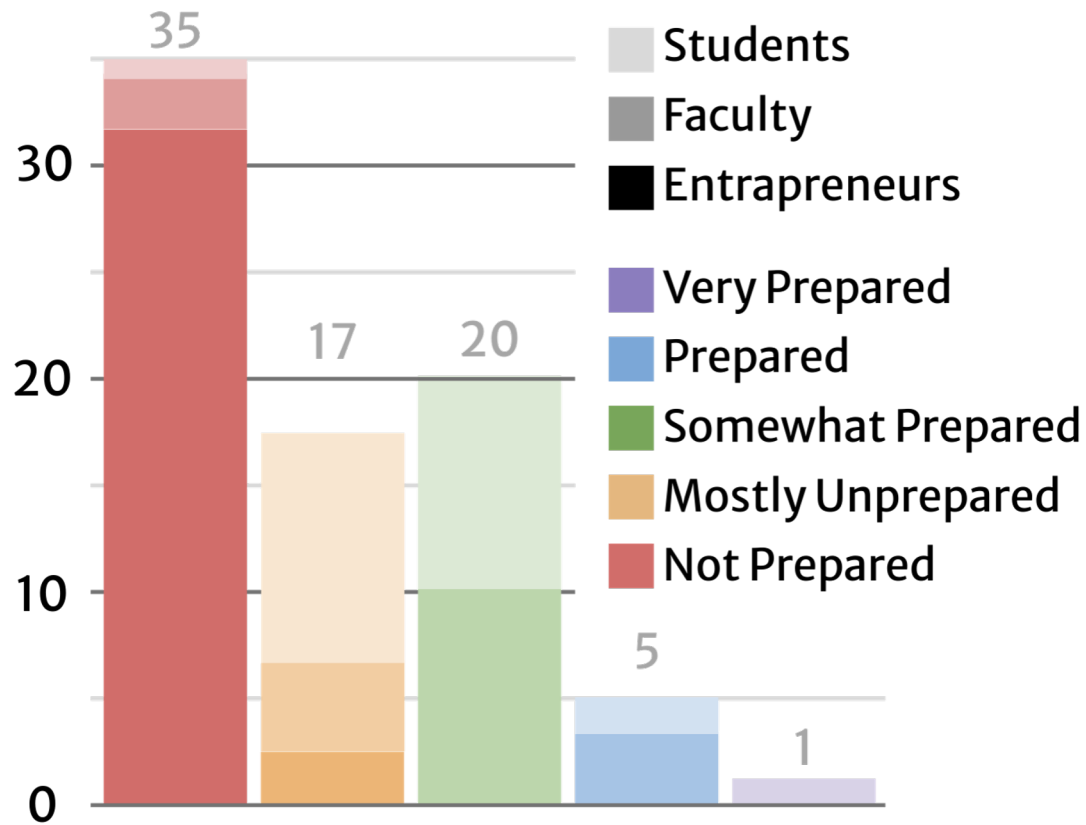
Entry Level Preparedness for Business



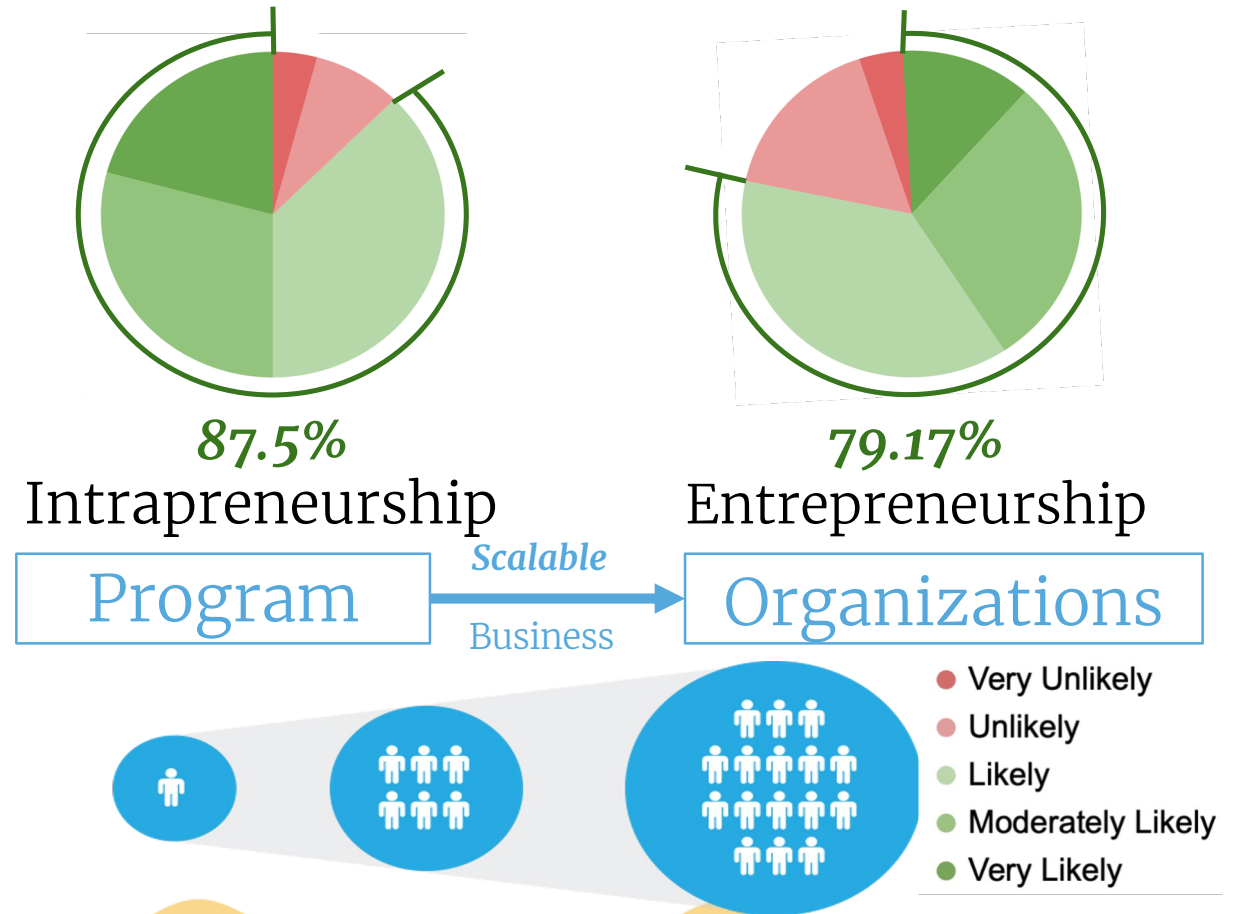
Needs Assessment

Business Components

Entry Level Preparedness for Business



Students Likelihood of Pursuing...





IDEAS **2** IMPACT

Business Brilliance for Community Innovation

Learning Modules

IDEAS **2** IMPACT



Module 1: Ignite

Students

Fundamentals

Module 2: Glow

Emerging Leaders

Intrapreneurship

Module 3: Shine

Innovative Founders

Entrepreneurship

IDEAS **2** IMPACT

Module 1



ACOTE	B.4.8. Quality Management and Improvement	B.4.4. Business Aspects of Practice		B.4.7. Evolving Service Delivery Models	B.4.9. Supervision of Personnel
Business Components	<ul style="list-style-type: none"> Determine Needs (Apply) Admin changes (Evaluate) Develop quality changes (Evaluate) 	<ul style="list-style-type: none"> Evaluation models (Eval) Business Plans (Evaluate) Strategic Plans (Evaluate) Liability (Evaluate) 	<ul style="list-style-type: none"> Financial Mgmt (Evaluate) Reimbursement (Evaluate) Grants (Understand/ Create) 	<ul style="list-style-type: none"> Service delivery options (Apply) Promote / Market (Apply) 	<ul style="list-style-type: none"> Form/Manage Staff(Apply) Supervise Staff (Apply) Staff Development (Analyze)
Topics	Quality	Business	Finance	Promote	Personnel
Course Learning Objectives	Develop a comprehensive service delivery plan for an OT program that includes an analysis of programmatic needs, delivery options, and an ongoing quality improvement plan.	Create a comprehensive business plan for an occupational therapy service that includes strategic planning, financial projections, ensuring sustainability and compliance with liability requirements.	Create a comprehensive budget for an occupational therapy service that includes current trends in reimbursement, financial projections, reasonable productivity requirements and supports sustainability.	Create a comprehensive promotional plan for an occupational therapy service that supports business plan.	Develop a comprehensive training program for staff that integrates legal and ethical guidelines, supports competency-based growth, and aligns with staff responsibilities.
Core Assignments	Community Needs Assessment	Strategic Plan	Finance Plan	Promotional Educational Materials	Personnel Plan
Intrapreneurship: Community Service Project					
Entrepreneurship: Business Proposal Presentation					

IDEAS **2** IMPACT

Implementation



Capstone Mentor
Patty Coker-Bolt
PhD, OTR/L, FNAP, FAOTA



Site Mentor
Dr. Candace Alvey, OTD, OTR/L
n=23 Entry-Level MS OT Students



Community Partner
Jessica Anderson, MS OTR/L
Director of Preschool & Nursery



IDEAS2IMPACT

Course Map

Week	1	2	3	4	5	6	7	8						
Quality	Community Needs Assessment			Administrative Changes		Community Service Project	Evaluate Outcomes	Business Presentation						
	Interview	Observe	Intervention	Outcome Measures										
Business	Business Plan						Community Service Project		Scaling Projects to Organizations	Business Presentation				
		Goals	Action Plan	Eval Models	Risk Mgt									
Promotion	Promotion								Community Service Project		Service Models	Business Presentation		
			Service Models	Develop Materials										
Personnel	Establish Teams				Personnel Plan						Community Service Project		Staff Capacity	Business Presentation
					Roles Competency Supervision									
Finance						Community Service Project		Finance Plan					Business Presentation	
								Budget Reimburse Grants						

IDEAS2IMPACT

Course Map

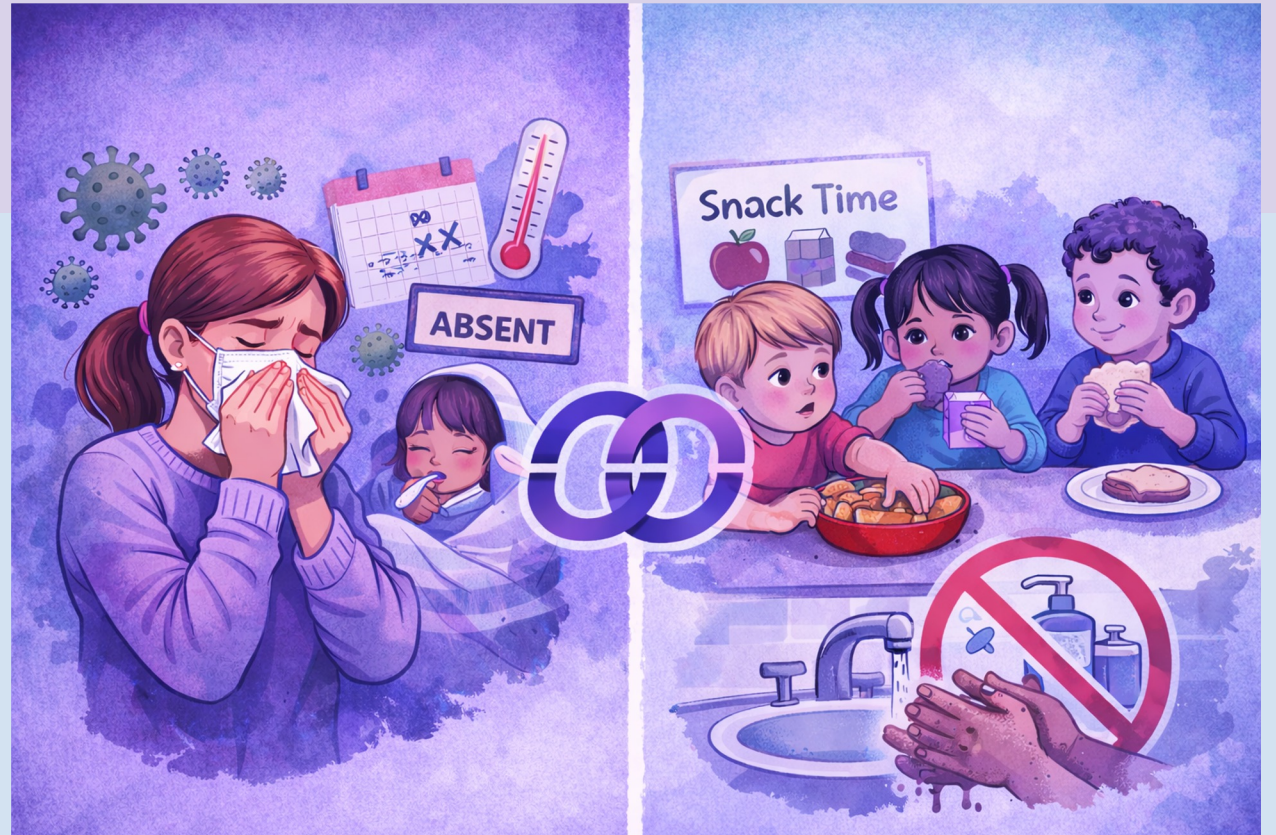
Week	1		
Quality	Community Needs Assessment Interview		
Business			
Promotion			
Personnel	Establish Teams		
Finance			



IDEAS 2 IMPACT

Course Map

Week	1	2
Quality	Community Needs Assessment	
	Interview	Observe
Business		Business Plan
		Goals
Promotion		
Personnel	Establish Teams	
Finance		



IDEAS 2 IMPACT

Course Map

Week	1	2	3
Quality	Community Needs Assessment		
	Interview	Observe	Intervention
Business		Business Plan	
		Goals	Action Plan
Promotion			Promotion
			Service Models
Personnel	Establish Teams		
Finance			



IDEAS2IMPACT

Course Map

Week	1	2	3	4
Quality	Community Needs Assessment			Administrative Changes
	Interview	Observe	Intervention	Outcome Measures
Business	Business Plan			
	Goals	Action Plan	Eval Models	
Promotion	Promotion			
		Service Models	Develop Materials	
Personnel	Establish Teams			
Finance				



IDEAS2IMPACT

Course Map

Week	1	2	3	4	5
Quality	Community Needs Assessment			Administrative Changes	
	Interview	Observe	Intervention	Outcome Measures	
Business	Business Plan				
		Goals	Action Plan	Eval Models	Risk Mgt
Promotion	Promotion				
			Service Models	Develop Materials	
Personnel	Establish Teams				Personnel Plan Roles Competency Supervision
Finance					



IDEAS 2 IMPACT

Course Map

Week	1	2	3	4	5	6			
Quality							Community Service Project		
Business									
Promotion									
Personnel									
Finance									

IDEAS 2 IMPACT

Course Map

Week	1	2	3	4	5	6	7	
Quality	<p>The illustration depicts the DIP-WASH program. On the left, a man and a child are shown with a large orange water barrel. In the center, a woman is washing two children at a public sink. On the right, there are financial documents: a 'Billing' sheet with stacks of money, and a 'Kentucky Medicaid Fee Schedule' listing services like Sensory Integrative Techniq (\$37.99), Self-Care/Home Management (\$19.88), and Cognitive Intervention (\$14.27). The background features a rural landscape with houses and a water tower, overlaid with dollar signs.</p>							
Business								Evaluate Outcomes
Promotion								Scaling Projects to Organizations
Personnel								Service Models
Finance								Staff Capacity
								Finance Plan Budget Reimburse Grants

IDEAS 2 IMPACT

Course Map

Week	1	2	3	4	5	6	7	8
Quality								Business Presentation
Business								
Promotion								
Personnel								
Finance								

Knowledge
Acquisition

Knowledge
Application

Learning
Experience

Quantitative

Weekly Quizzes

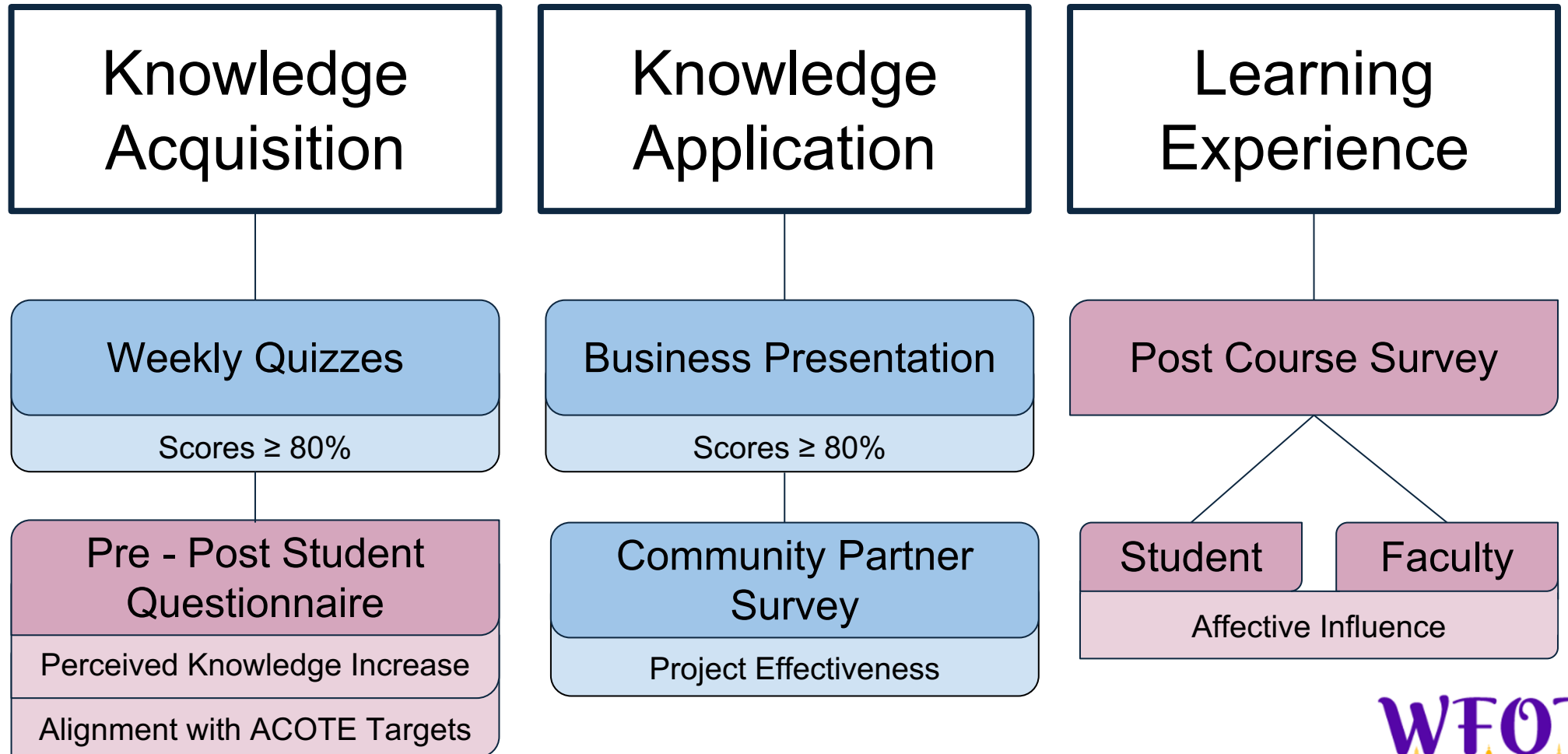
Scores \geq 80%

Business Presentation

Scores \geq 80%

Community Partner
Survey

Project Effectiveness



Results

Outcomes

Knowledge Acquisition

Knowledge Application

Learning Experience

Quantitative

Weekly Quizzes

>83% of quizzes scored $\geq 80\%$

Business Presentation

Scores $\geq 80\%$

Post Course Survey

Qualitative

Pre - Post Student Questionnaire

Perceived Knowledge Increase

Alignment with ACOTE Targets

Community Partner Survey

Project Effectiveness

Student

Faculty

Affective Influence

Results

Outcomes

Knowledge Acquisition

Knowledge Application

Learning Experience

Quantitative

Weekly Quizzes

>83% of quizzes scored $\geq 80\%$

Business Presentation

Scores $\geq 80\%$

Post Course Survey

Qualitative

Pre - Post Student Questionnaire

>57% Perceived Increase

Alignment with ACOTE Targets

Community Partner Survey

Project Effectiveness

Student

Faculty

Affective Influence

Results

Outcomes

Knowledge Acquisition

Quantitative

Weekly Quizzes

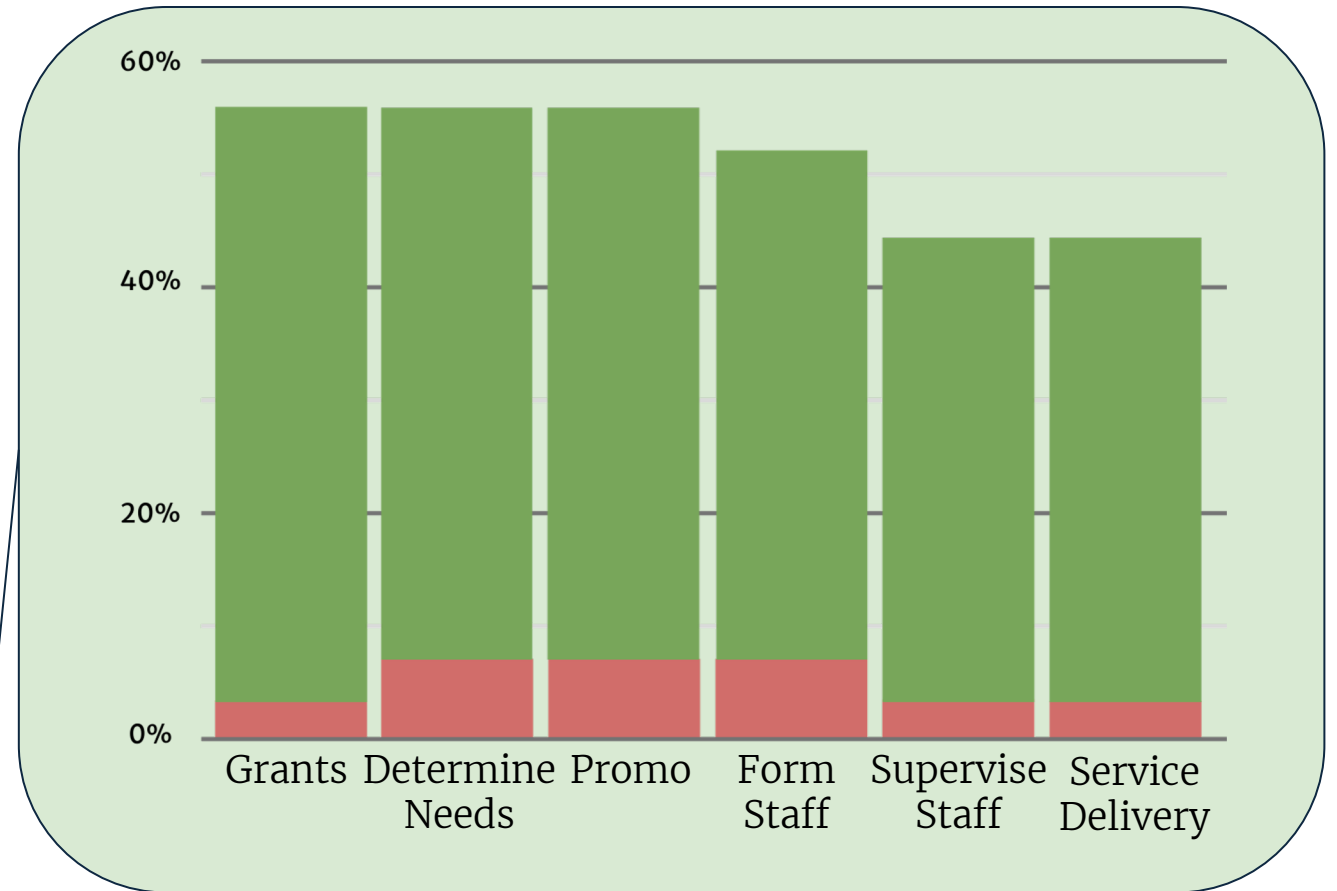
>83% of quizzes scored \geq 80%

Qualitative

Pre - Post Student Questionnaire

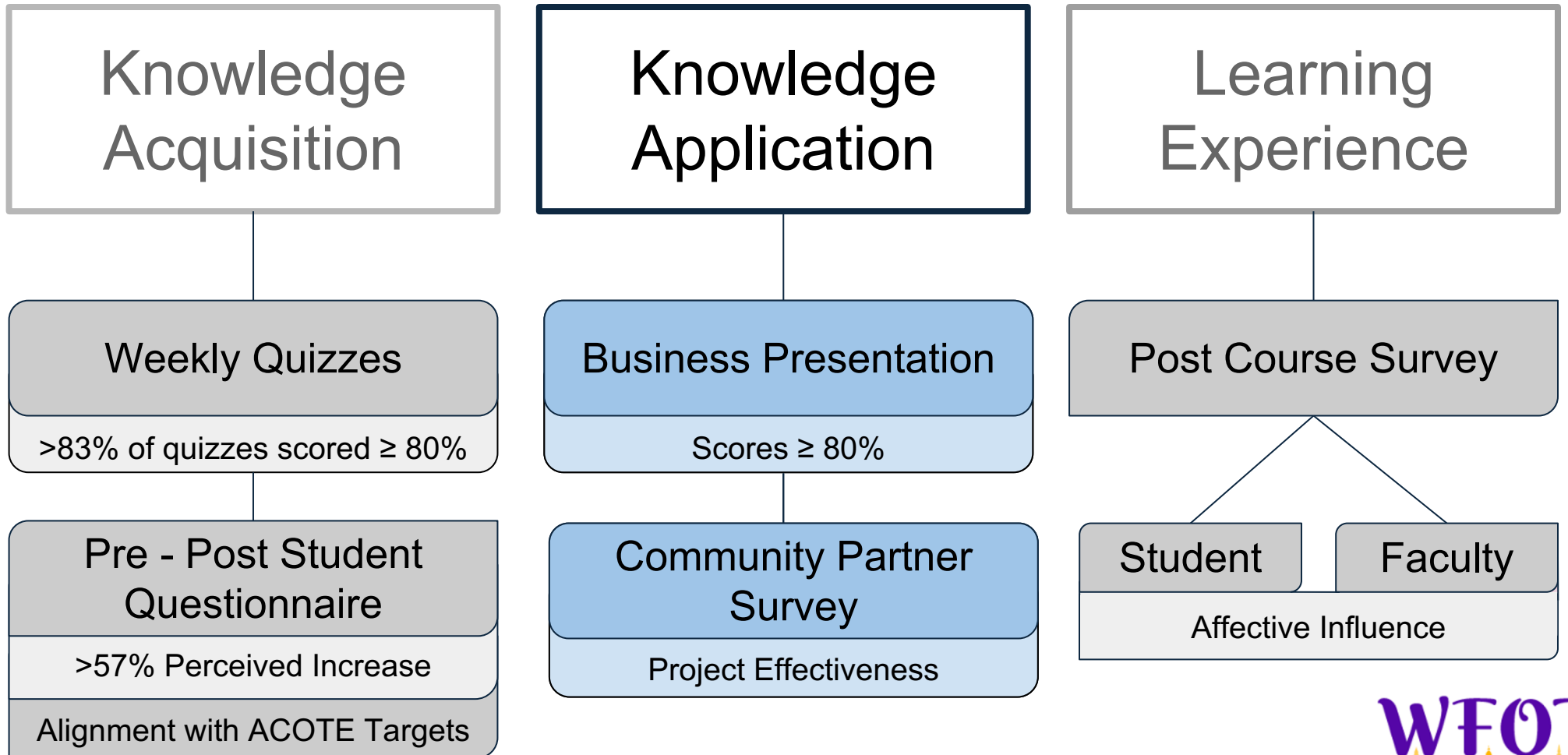
>57% Perceived Increase

Alignment with ACOTE Targets



Results

Outcomes



Results

Outcomes



Hand Hygiene Initiative



Parent-Child Engagement



Resource Allocation

Knowledge Application

Business Presentation

80% of groups scored $\geq 80\%$

Community Partner Survey

Project Effectiveness

Kinesthetic Social Learning



Volunteer Engagement



Two Independent Raters; Inter-Rater Reliability: 97.6% Agreement

Results

Outcomes

Knowledge Acquisition

Knowledge Application

Learning Experience

Quantitative

Weekly Quizzes

>83% of quizzes scored \geq 80%

Business Presentation

80% of groups scored \geq 80%

Post Course Survey

Qualitative

Pre - Post Student Questionnaire

>57% Perceived Increase

Alignment with ACOTE Targets

Community Partner Survey

>83% Highly Effective

>16% Effective

Student

Faculty

Affective Influence

Results

Outcomes

Knowledge
Acquisition

Quantitative

Weekly Quiz

>83% of quizzes scored

Qualitative

Pre - Post Student
Questionnaire

>57% Perceived Increase

Alignment with ACOT

“Upon graduation, they will be better equipped to take on various roles in the settings they will practice in.”

- Faculty

Learning Experience

Post Course Survey

Strong Agreement

Student

Faculty

Affective Influence

Results

Outcomes

“My perspective on adhering to client needs was shifted to truly understand what client-centered treatment means.”

Theme 1: Appreciated Real-World Impact

Learning Experience

Post Course Survey

Strong Agreement

Student

Faculty

Affective Influence

Results

Outcomes

“It is important so that we are aware of what it takes to run a business. It lets us see all of the different aspects of operating a business that we might not be aware of.”

Theme 1: Appreciated Real-World Impact

Theme 2: Insights Into Business Practices

Learning Experience

Post Course Survey

Strong Agreement

Student

Faculty

Affective Influence

Results

Outcomes

*“Working as a team with so many different strengths and personalities taught me to be **respectful** of other people’s ideas and thoughts”*

Theme 1: Appreciated Real-World Impact

Theme 2: Insights Into Business Practices

Theme 3: Valued Shared Leadership

Collaboration

Communication

Critical Thinking

Emotional Intelligence

Learning Experience

Post Course Survey

Strong Agreement

Student

Faculty

Affective Influence

Conclusion



Find Out More: Scan

Faculty: Pilot a Unit

Intrapreneurs: Host a project

Entrepreneurs: Sponsor a partner site

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Handout