

**Pennsylvania Occupational Therapy Association**

**STRATEGIC PLAN**

(approved by POTA Board 10/09)

This document outlines the goals of the Pennsylvania Occupational Therapy Association as well as the objectives and primary actions to achieve those goals. Because of the fluidity of action plans and responsible parties, specific information related to those areas has not been included. For additional information related to the status of the strategic plan and specific initiatives, members should contact the Vice President or other Board Member.

**Goal I. Organizational Stewardship: Ensure fiscal and organizational viability, efficiency and effectiveness to successfully meet the needs of the membership.**

OBJECTIVE/STRATEGY	Action Required
<b>A. Preserve Organizational Fiscal Viability</b>	
<b>Strategy 1.</b> Ensure the effectiveness of the collaboration between the association manager and treasurer and accountant.	Conference calls between Treasurer, Association Manager, and Accountant to be held formally 3 times per year prior to the March, June and October Board Meetings. Results of these meetings to be included in the Treasurers Report for each meeting
<b>Strategy 2.</b> Identify and obtain at least 2 sponsors who will support ongoing POTA initiatives - including but not limited to: POTA Scholarship Program, Practice Initiatives, POTA Marketing, etc.	<p>Contact District Delegates for sources of sponsorship.</p> <p>Review current list of sponsors and compare with known vendors/employers that support OT and evaluate relationships to determine viability of sponsorship.</p> <p>Make contact with sponsors related to specific areas of sponsorship.</p> <p>Establish a contact person and develop a flyer to increase knowledge of sponsorship opportunities and provide to each vendor at conference.</p> <p>Email contact with current and past sponsors letting them know about opportunities for sponsorship of specific programs- determine the benefits for the sponsor.</p>
<b>Strategy 3.</b> Increase membership by 25% of current membership number of 1200 by June 2009	<p>Target non-members through a flyer/postcard campaign highlighting current happenings and PA practice issues; member benefits.</p> <p>Utilize free social networks- facebook etc to increase awareness of POTA</p> <p>Highlight member benefits in Penn Point and on the website- obtain testimonials about support provided to them by being members</p> <p>Target schools to encourage POTA membership- send email to fieldwork coordinators- by Sept 09 Offer ½ price or a discounted membership for the 1<sup>st</sup> year following graduation. Identify logistics of how to do this. By Jan 2010 to be able to make contact again prior to end of school year.</p>

<b>Strategy 4.</b> Explore pro and cons of offering corporate partnerships with POTA	Identify benefits for corp and the members and review at the October Board Meeting
<b>B. Facilitate Customer Services</b>	
<b>Strategy 1.</b> Develop a checklist for business that needs to be addressed at June and October Board Meetings	Complete checklist prior to use at Oct 2009 Board Meeting
<b>Strategy 2.</b> Review all district & state board positions to ensure that Orientation Packet (that includes Procedure Guide/Responsibilities for each position) is distributed in a timely manner	Prepare update of newly appointed and elected District and State positions in COOA report  Explore feasibility of Board Only Section on Website to contain- Orientation manual, minutes from previous meetings, reports from previous meetings etc
<b>C. Optimize Organizational Effectiveness</b>	
<b>Strategy 1.</b> Review by-laws and make recommendations for change	By-laws chair to collect information annually from board regarding

**GOAL II Occupational Therapy Practice: Preserve the Occupational therapy scope of practice in Pennsylvania.**

<b>A. Promote Occupational Therapy services to payors, public, and referral sources</b>	
<b>Strategy 1.</b> Operationalize public relations and membership committees for ongoing promotion of Occupational Therapy throughout the Commonwealth of Pennsylvania	District Delegates report to COOA/PR committee "OT Awareness" activities in their district for publication/sharing with other districts
<b>Strategy 2.</b> Preserve and advance reimbursement for Occupational Therapy services within the Commonwealth of Pennsylvania	Operationalize Reimbursement Committee to be a clearing house for issues
<b>Strategy 3.</b> Operationalize Legislative Committee to respond to legislative issues brought to their attention via Lobbyist and/or Lawyer	Identify chair for committee.  District Delegates to develop and maintain a list of members in their district interested in attending legislative activities to represent POTA  Legislative Chair to contact District Delegates for legislative activities
<b>B. Maximize opportunities for Occupational Therapy practitioners in a variety of practice areas</b>	
<b>Strategy 1.</b> (revised) Ensure an article in each Penn Point reflecting the current issues in OT practice	COP
<b>Strategy 2.</b> Promote the use of established OT resources (AOTA, NBCOT, etc)	Encourage use of NBCOT mentoring process by POTA members

<b>Strategy 3.</b> Determine opportunities for collaboration between COE and COP	Identify 1 opportunity for collaboration
<b>Strategy 4.</b> Develop mentorship system for OT practice areas	Encourage use of NBCOT mentoring process Explore revision of membership form to include willingness to participate in mentorship
<b>C . Continue to support member practice in existing OT models</b>	
<b>Strategy 4.</b> Explore ways to optimize education of members of the challenges to OT practice	Explore use of blast emails/Penn Point/website to inform members of “hot topics/issues” Explore use of “POTA Practice Alert” as communication between members and Board Explore including “POTA Practice Points” on the website (similar to AOTA 1 minute)

**Goal III Professional Development: Provide the membership with opportunities for lifelong professional and career development that facilitates continued competency.**

<b>A. Provide an OT-based educational conference annually that generates revenue as well as offers educational opportunities for OT practitioners.</b>	
<b>Strategy 1.</b> A central conference commission (CCC) will be maintained to oversee the Annual Conference process, and will report to the POTA Exec Board (as needed, and at each Board meeting). Chair is appointed by POTA president, and committee members (2 east, 2 west, 2 central, 1 technology) are appointed by CCC Chair in collaboration with POTA President. CCC position terms will be at discretion of Exec Board.	Ensure that by-laws accurately reflect change of CCC from being a committee under COOA to its own commission, and that term limits and position transitions are defined.
<b>B. Provide additional affordable opportunities for continuing education to the membership in a budget neutral capacity</b>	
<b>Strategy 1.</b> Develop & maintain opportunities to share educational opportunities and resources among districts.	A list of PA OT practice experts will be developed

<p><b>Strategy 2.</b> Improved utilization of POTA website by district delegates will be encouraged.</p>	<p>Board members will direct website recommendations through COOA</p>
<p><b>C. Create and support opportunities for leadership exploration through active organizational participation.</b></p>	
<p><b>Strategy 1.</b> POTA Board will develop successful recruitment strategies for Board positions.</p>	<p>Board will be polled re: successful recruitment experiences/ strategies</p> <p>Results and action recommendations will be brought to the Board for prioritization</p>
<p><b>Strategy 2.</b> Develop leadership mentoring guidelines for Board positions.</p>	<p>Outgoing leaders will show evidence of having mentored their replacements</p> <p>Hard copies of position mentoring will be collected, to help create Board mentoring structure</p>
<p><b>Strategy 3.</b> Develop more transparent leadership ladder/ reward system to better recruit new and retain old leaders</p>	<p>POTA leadership education modules will be developed and trialed</p> <p>Website, Penn Point, Awards Ceremony will be used to communicate leadership opportunities to membership</p>
<p><b>Strategy 4.</b> Create and maintain leadership support systems throughout organization</p>	<p>a. Intro/resource letters to new leaders will be developed</p> <p>b. Simplified Bylaws Fact sheet will be created</p> <p>c. Nominations Chair position will be filled</p> <p>d. Nomination mechanisms will be designed to be “automatic” as names are generated thru POTA systems</p>