

STRATEGIC PLAN

2021-2023



Company Overview

Mission Statement

Our mission is to promote the continued and competent practice of occupational therapy; to impact health care, legislative, and reimbursement communities as advocates for the consumer and the profession; and to be responsive to the needs of the membership by promoting professional education, communication, and monitoring trends in health care and in the community that affects the practice of occupational therapy.

Vision Statement

Our vision for NCOTA is to become a robust, diverse, and proactive organization capable of effectively supporting OT practitioners in NC to be leaders in the healthcare field and work to improve the lives of clients they serve.

Core Values

These are the Core Values of NCOTA:

- 1. Education and Advocacy**
- 2. Diversity and Inclusion**
- 3. Accessibility and Transparency**
- 4. Community**
- 5. Best Practice**

Purpose

The purpose of the NCOTA Strategic Plan is to guide NCOTA leadership in a strategic way towards goal attainment and to ensure the organization is progressing towards our mission and vision. This plan should be reviewed at each board meeting and action towards each designated area should be tracked. This strategic plan should be a flexible, living document that changes based on organizational and stakeholder needs to ensure NCOTA is responsive to the needs of our community.

Analysis

Strengths	Opportunities
<ul style="list-style-type: none"> • Financial status • Devoted, accountable leadership • Active with advocacy • Strong conference offerings grounded in best practice • Program faculty/student resources available • Positive relationship with lobbyist • Prioritized DEI initiatives and working with consulting group to improve in this area • Full board 	<ul style="list-style-type: none"> • Use of technology to expand access across state • Mentorship within the organization, could be expanded to OT/OTAs across state • Expand diversity of conference topics • Engagement with OT/OTA programs in state (expand on existing efforts) • OTA memberships (have OTA student participation) • Support those maintaining their license but not working actively in the field or in non-traditional roles • Increased OT/OTA programs
Weaknesses	Threats
<ul style="list-style-type: none"> • Lack of infrastructure (SOP, transition process) • Low membership/minimal active participation • Little action on conversation • Diversity • Interdisciplinary collaboration • Ability to retain members • Communication with membership (transparency, awareness of what we are doing) • Unclear path to access resources (i.e., mentoring) 	<ul style="list-style-type: none"> • Lack of FW sites • Lack of clarity of roles and relationship between state board and AOTA • Poor relationship with employers (membership/participation not encouraged) • Technological reliance on NCOTA Office Administrator; no backup

Strategic Goals and Actions

Strategic Objectives

1. Diversity and inclusion:

1. To have leadership to be representative of diversity of practitioners and people we serve in our state
2. To grow diversity of profession through education, scholarships
3. Increase interprofessional engagement

2. Outreach:

- **Membership**

1. To increase membership by at least 10%
2. Increase collaboration with early education programs (e.g., middle school, high school, college)
3. Increase collaboration with OT employers in the state to support employee membership
4. Have more participation in activities in our community

- **Marketing**

1. To demonstrate the benefit and value of NCOTA to OT/OTA practitioners
2. To demonstrate the value of NCOTA to other professions and stakeholders (i.e., employers, legislators, etc.)
3. To have a dynamic, accessible, and frequently reviewed website to support membership and effective engagement.

3. Advocacy:

1. Establish streamlined advocacy initiatives for members throughout the year
2. Educate members on advocacy skills, strategies, and opportunities
3. Ensure active involvement of SIS Co-chairs in advocacy endeavors in their established area of practice

4. Communication:

1. To provide clear, consistent, and intentional communication with members

5. Infrastructure:

1. To have a clear, consistent, diverse, and predictable infrastructure
 - Organization/archiving:
 1. Seamless, efficient storage of emails and other important documents/communication
 - Policies and protocols:
 1. To have clear standard operating procedures for all positions and committees
 - Bylaws revision:

1. Establish committee to review Articles of Incorporation (not reviewed since 1986)
2. Successfully revise bylaws for 2021
 - SIS structure and function
 - Succession plan and communication processes between outgoing and incoming board members

6. Education:

1. Increase educational opportunities and awareness of best-practices
2. Establish formal mentoring program to support knowledge expansion and connection for new graduates and/or practitioners changing setting
3. Establish formal FW and capstone opportunity with NCOTA to support knowledge of administration and leadership skills

Action Planner-Year 2021-22				
Action	Due	Owner	Status	Priority
1. 100% of NCOTA Board to participate in racial equity training.	2/2022	President	In process	
2. Establish DEI as official SIS through Bylaws revision.	11/2021	Bylaws Chair/President	Met	
3. Establish full NCOTA Board.	1/2022	All	Met	
4. Identify 2-3 support people for website updates.	1/2022	Communications and Outreach, OA	In process	
5. Develop SOP to standardize process for website updates.	10/2021	Communications and Outreach, OA, President	In process	
6. Update NCOTA website for ease of viewing, updated material, and automatic responses to show transaction success.	10/2021	OA, Communication and Outreach	Met	
7. Establish Legal/Political co-chair through Bylaws revision	11/2021	Bylaws Chair/President	Met	
8. Create 'master post' timeline to ensure frequent communication and key events are highlighted (e.g., June=thank you to outgoing board members, July=welcome, August=call for proposals)	2/2022	Communications and Outreach	In process	
9. Provide education on call for comments and advocacy approaches-training materials, conference session, etc.	1/2021	Legal and Political		
10. Establish SOP for all major NCOTA processes (elections/nominations, transitions, bylaws revision, succession, etc.)	2/2022	Executive Board	In process	
11. Create NCOTA Monthly Newsletter with key updates about what NCOTA is doing, member highlights, etc.	2/2022	Communications and Outreach?	Move to quarterly	

12. Create member survey to inquire about 'what they want to see, how best to communicate'	12/2021	Membership	Issues with getting new members or retention; comm. Preferences (email)	
13. Establish formal mentoring program to support knowledge expansion and connection for new graduates and/or practitioners changing setting	1/2022	Education and Research	Met	
14. Establish formal FW and capstone opportunity with NCOTA to support knowledge of administration and leadership skills	3/2022	Education and Research	Met	
15. Create general board member handbook (similar to SIS handbook)	1/2022	Secretary?	Met	
16. Establish NCOTA presence on variety of social media formats with regular updates	12/2021	Communications and Outreach	In process; added Instagram this year. Considering Youtube Channel	

Action Planner-Year 2022-23				
Action	Due	Owner	Status	Priority
1. 100% of NCOTA Board to participate in racial equity training.	6/2023	President		
2. Complete website SOP and identify support people	2/2023	President, Communications, Administrator		
3. Provide education on call for comments and advocacy approaches-training materials, conference session, etc.	2/2023	Legal and Political		
4. Establish SOP for all major NCOTA processes (elections/nominations, transitions, bylaws revision, succession, etc.)	3/2023	Executive Board	In process	
5. Create NCOTA Quarterly Newsletter with key updates about what NCOTA is doing, member highlights, etc.	11/2022	Communications and Outreach		
6. Ensure NCOTA Committees are active and include OTAs for representation	11/2022	Executive Board/President Elect		
7. SIS co-chairs to complete action plan/goals for the year	10/2022	SIS Coordinator		
8. Establish exec. Committee members on each committee and as support for board	10/2022	President, Executive Board		
9. Create school circuit to engage students with NCOTA (e.g, booth at event, pizza SOTA, guest appearances by lobbyist/advocacy)	2/2023	Education & Research, Students		
10. Create streamlined system for advocacy efforts amongst SIS areas and Advocacy Co-	1/2023	Legal and Political, SIS Coordinator		

chairs to ensure effective communication and efficiency				
11. Increase visibility of advocacy efforts and role of NCOTA with advocacy	2/2023	Legal and Political, Communications		
12. Complete at least 1 virtual, 'open' forum (open to all practitioners) to showcase NCOTA and what we are going to support NCOTA engagement (what are advocacy things that affect them?, offer 1 CEU, etc.)	4/2023	President, Guest Speaker (someone who sparks interest), Leadership		
13. Create graduating student initiative to support NCOTA loyalty and membership (networking, SIS connection, etc.)	5/2023	Education and Research, Membership		
14. Market NCOTA membership to employers	3/2023	Membership		
15. Sponsor at least 2 booths at non-NCOTA OT/OTA events/conferences	6/2023	DEI, Treasurer		