

STRATEGIC PLAN

2025-2027



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:

- Education and Advocacy
- Diversity and Inclusion
- Accessibility and Transparency
- Community
- 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.

SWOT Analysis

Strengths (internal to organization)	Opportunities (External trends, events, etc.)
<ul style="list-style-type: none"> ● Strong advocacy resources/supports and efforts ● Dedicated DEI committee ● Systems in place to ensure improving and maintaining financial status ● Large board with good volunteer engagement ● Good attendance at conferences with high satisfaction 	<ul style="list-style-type: none"> ● Increased diversity of OT profession could support improved diversity of NCOTA membership and board with effective marketing ● Student involvement, students frequently engage in poster sessions or presentations at conferences, students also volunteer and learn about NCOTA when conferences are held at OT / OTA schools ● Available support from AOTA for advocacy initiatives and from ASAP ● Potential for collaboration in advocacy efforts with PT and ST organizations
Weaknesses (internal to organization)	Threats (external to organization)
<ul style="list-style-type: none"> ● Declining membership and engagement ● Lack of structure or standard process for student engagement / education efforts with schools ● Provide clearer guidance for board member roles to improve coordinated collaborative efforts that support desired outcomes and directly engage membership or lead to marketable outcomes for membership ● Website is outdated and processes are not in place for efficient, collaborative management, cheaper options could be available ● Limited financial resources and reserves ● Spending time on efforts/initiatives that do not advance the mission, vision, core values, purpose, and objectives of NCOTA and Board 	<ul style="list-style-type: none"> ● Decreased engagement in profession (seen at all levels including AOTA) ● Inflation, rising costs that prohibit some from paying membership dues or attending conferences ● Competition within the CEU market, options that require less time or cost less ● Challenging political environment that impacts healthcare and DEI ● Asked to address efforts/initiatives that do not advance the mission, vision, core values, purpose, and objectives of NCOTA and Board ● External demands or demands related to other areas of life placed on board members resulting in difficulty executing action items

Strategic Priorities and Action Items

Strategic Priorities

1. **Organizational Infrastructure:** To ensure NCOTA remains a sustainable and high-impact organization, we will focus on modernizing systems, increasing financial stability, and clarifying internal operations to support current and future leaders and our members.
2. **Engage and Retain Members:** Reverse the trend of declining membership and engagement by supporting meaningful connections, building value, and data-driven marketing
3. **Advocacy and Professional Development:** Serve as a leader and hub for advocacy, professional learning, and interdisciplinary partnerships to strengthen OT in NC

Strategic Priority: Organizational Infrastructure

Executive Board Action Items 2025-2026

Goal: Improve onboarding, expectations, and collaboration within the board

Steps:	Due	Supporting Board Members	Exec Board Members
1. Educate board on organizational structure and internal documents	July 25		President, VP, Secretary, Treasurer
2. Review board SOPs to identify any necessary updates or clarifications	Dec 25		President, VP, Secretary, Treasurer
3. Review compliance with documented policies and procedures	Dec 25		President, VP, Secretary, Treasurer
4. Outline roles and responsibilities for accountability measures	Jan 26		President, VP, Secretary, Treasurer
5. Hold mid-year board training to review expectations and implement accountability procedures	May 26		President, VP, Secretary, Treasurer

Strategic Priority: Organizational Infrastructure

Action Items: Redesign and Launch an Updated NCOTA Website

Goal: Improve accessibility, affordability, function, and user experience

Steps:	Due	Supporting Board Members	Exec Board Members
1. Audit current website for usability, cost, and performance	Sept 25	Office admin, Communications	Vice President

1.5 Identify needs for future platform (email, CRM, etc)	Oct 25	Office admin, Communications	Vice President
2. Research alternative platforms and create a transition proposal (identify 3-5 options and pricing, identify what stays and what goes)	Nov 25	Office admin	Vice President, Treasurer
3. Finalize vendor and migrate content	Jan 26	Office admin	Vice President, Treasurer
4. Create new content for website as needed	Feb 26	Communications, Membership, Office admin	Vice President
5. Provide training to board on updating and maintaining web content	March 26	Office admin	Vice President
6. Announce new website to members	March 26	Communications, Membership, all co-chairs with email lists for members	Vice President

Strategic Priority: Engage and Retain Members			
Action Items: Launch a Membership Engagement & Retention Campaign with Marketing Initiative			
Goal: Identify opportunities for membership engagement & retention while improving consistency in messaging, build brand identity, and recruit members			
Steps:	Due	Supporting Board Members	Exec Board Members
1. Develop and launch annual member feedback survey	October 25?	Membership, Communications, Education & Research SIS co-chairs, Student Board Member	Secretary
2. Quarterly reports on membership trends and engagement data	Nov 25?	Office admin, Membership	Secretary
3. Audit member segments and tagging system	Dep on website?	Office admin, Membership, Communications	Secretary
4. Audit automated emails to identify what sequences exist and ensure accurate information	Dep on website?	Office admin, Membership, Communications	Secretary
5. Draft segmented email sequences/updates (welcome, expiring,	Dep on website?	Office admin, Membership, Communications	Secretary

lapsed, upgrade, promotionals with OTPotential and ContinuEd)			
6. Finalize a brand kit including logos, fonts, and Canva templates	Dep on website?	Office admin, Membership, Communications	Secretary
7. Create year-long content calendar for social media and email (include key dates, SIS and other board updates, and evergreen social media posts/emails encouraging membership and benefits)	Mid-year in Jan 26 and then end of year in May 26?	Office admin, Membership, Communications	Secretary

Strategic Priority: Advocacy and Professional Development			
Action Items: Establish Standardized Conference Planning Timelines and Workflow			
Goal: Improve internal coordination and ensure timely promotion of conference as well as sufficient board engagement to successfully consolidate to one annual conference			
Steps:	Due	Supporting Board Members	Exec Board Members
1. Develop a general 12 month timeline for fall conference planning tasks (e.g. location, speakers, marketing, and registration)	March 26	Continuing Education Co-chairs, Awards Chair, Technology SIS Co-chairs	President, Treasurer
2. Draft workflow for organizing fall conference that can be reused each year including all relevant details such as issuing and reviewing call for papers, ordering food, touring facility, etc.	March 26	Continuing Education Co-chairs, Awards Chair, Technology SIS Co-chairs	President, Treasurer
3. Audit/create SOPs and documents used for call for papers, speaker expectations/communications, host communications, etc.	Jan 26	Continuing Education Co-chairs, Awards Chair, Technology SIS Co-chairs	President, Treasurer
4. Design/update webpage with relevant conference details that is updated quarterly or whenever new information is confirmed	May or June 26	Continuing Education Co-chairs, Office admin, Communications	President, Treasurer
5. Outline needs checklist for seeking hosting sites, finalize contract and outline for establishing a location to host	May 26	Continuing Education Co-chairs, Office admin,	President, Treasurer