

STRATEGIC PLAN

2024-2025

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:

- 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.

Analysis

Strengths (internal to organization)	Opportunities (trends, events, etc.)
<ul style="list-style-type: none"> • Solid advocacy team • Board is near full • Board is near equally comprised of board members with experience and new board members (balance of experience and fresh perspectives) • Dedicated DEI efforts • Growing student involvement, students frequently engage in presentations at conference, some efforts in place to reach out to schools / students, conferences now held at OT / OTA schools • Community support is available if we seek it out • Strong Speakers at conferences for NCOTA • Systems in place to ensure improving financial status 	<ul style="list-style-type: none"> • Willingness of PT and ST organizations to engage in collaboration in advocacy • Increasing engagement, membership, and interest among OT / OTA students in NC • Collaboration with entrepreneurs • Improve diversity of NCOTA board and members, improve representation of diverse OTP workforce • Collaboration with employers and organizations • Engaging speakers available to NCOTA for more events • Society for the Study of Occupation (SSO) Conference in Durham 2024 • AOTA Education Summit in Charlotte 2024 • New partnership for virtual continuing education offerings • Available support from AOTA for advocacy initiatives • Medicaid transformation in process • Increase in OT entrepreneurs and OT small businesses • Increased society awareness of mental health needs in adults and pediatrics
Weaknesses (internal to organization)	Threats (external to organization)
<ul style="list-style-type: none"> • Membership declining • Lack of direct student engagement / education efforts with schools • Improve coordinated collaborative advocacy efforts that support desired outcomes • Website is outdated and expensive • NCOTA does not have a financial reserve 	<ul style="list-style-type: none"> • Decline in healthcare reimbursement • Decreased engagement in profession • Decreased desire to expand healthcare services and pay in legislature • Changes in telehealth and removal of BCBS telehealth specifically and decrease in access to Rural communities

- Lack of established communication between multiple payers
- Lack of routine engagement with PT and ST associations for advocacy efforts
- Lack of coordinated advocacy efforts that directly engage membership
- Limited representation in membership from OT small businesses
- Practitioners may not feel prepared for all settings that OT is needed and valid (ex: mental health, academia, pediatrics etc)

- Inflation, limited external accountability for financials
- Third party interest in partnerships with Medicaid that could reduce access and reimbursement for OT services
- Decline in applications to OT and OTA programs
- Provider shortage of OTs and OTAs for needed positions

Strategic Goals and Actions

Strategic Objectives

1. Infrastructure

1. Increase account balance to \$100,000 by July 1, 2025 and reserves to \$25,000
2. Maintain a budget that accurately reflects the costs of the organization and supports profit margin of 15%+ on a yearly basis
3. Establish and develop active board committees to progress the work of the organization (Advocacy, Conference, Financial, Marketing, DEI)
4. Develop relationships with OT and OTA programs
5. Updated SOP for Treasurer role and financial processes
6. Improve clarity for how the board functions with decision making within individual roles
7. Website improvements (cost, membership functions, accessibility)

2. Outreach:

• Membership

1. Increase membership to at least 8% of licensed OTPs in NC
2. Increase Employer and Associate memberships and Employer-sponsored memberships for individuals

• Marketing

1. Increase visibility of NCOTA for potential conference sponsors and vendors.
2. Create formal NCOTA branding initiative, content calendar, and support additional administrative efforts for NCOTA marketing initiatives and data collection/analysis
3. Ensure all NCOTA platforms communicate needs and NCOTA “asks” clearly (e.g., email signatures, website)

3. Diversity and Inclusion:

1. Continue to support DEI efforts through education, silent auction for action-based initiatives, and board training.
2. Commit to at least one DEI presentation each year at the fall conference
3. Develop DEI Toolkit on Virtual Platform for members

4. Advocacy

1. Establish streamlined advocacy initiatives, trainings, and education for members throughout the year.
2. Partner with allies, organizations, vital stakeholders for optimal advocacy effectiveness.

5. Education and Student Engagement

1. Engage OTP students in all facets of the NCOTA organization to support long-term engagement
2. Clear application process and marketing for Capstone and/or Level II FW student opportunities with NCOTA
3. Explore partnerships with other allied health professionals for shared events/educational opportunities
4. Explore continuing educational opportunities (comparison and decision making regarding working with partnership for virtual education vs internal platform)
5. Develop student specific offerings at conference

6. Communication

1. Ensure communication avenues are efficient, sustainable, accessible, and comprehensive.
2. Enhance accessibility on NCOTA website
3. Increase social media subscribers to 5,000+ (Facebook, Instagram, LinkedIn, YouTube) and ensure content is updated and diverse.
4. Ensure that membership receive email updates at least every other month of board activities

Action Planner-Year 2024-2025				
Action	Due	Owner	Status	Priority
1. Host (1) statewide virtual advocacy event.	July, 2025	Clarice and Dawn		
2. Develop clear guidelines for accessibility of CEU offerings.	Spring conference 2025	Christine McConnell, Mary Ann Brennan, Brittany Winslow Nicole and Sydney	Developing guidelines that can be shared	
3. Explore vendor platforms and partnerships (OT potential, medbridge, Aspire OT, etc) for virtual content.		Nichole B- lead Jennifer Lowder-supporting	Partially met, partnership with OT potential, in contact with medbridge	
4. Select how we will provide virtual CEU offerings.		Nichole B- lead	""	
5. Develop SOP for how to organize a SIS event (to include CEU events vs social gathering events) outside of spring / fall conference.	June 2025	Nichole Creech and SIS chairs		
6. SIS to plan 2-3 events outside of conference (virtual or in-person; CEU or social event) in their specialty area.	June 2025	Nichole Creech- lead the coordination and time table for this item Charley C- supporting		
7. Create a brand kit / design kit using online tools (potentially canva has a free pro version for nonprofits) that can be shared freely with board members.		Anna D- leading Brittini W	Past president Valerie developed a trifold for NCOTA to consider	
8. Hold 2 virtual advocacy meetings annually for those registered on the advocacy registry.		Clarice and Dawn	Dawn S	
9. Collaborate between leadership and conference committee to get a larger variety of content at conference		Mary Ann- leading this item		
10. Identify options and create proposal for changing emails and google drive to google workspace to improve communication and shared resources.		Clarice leading and Debb supporting	Clarice has begun research, needs 503C #	

11. Update Social media SOP to include: 1) Update backup process for social media to utilize NCOTA board emails. 2) Develop step by step process to support transitioning social media when co-chairs rotate.		Christine and Kayleigh, Debb supporting	Continued from 2024	
12. Create a guest lecture sign up on the website for OT and OTA schools who want to request a NCOTA board member speak. (Potentially create an official NCOTA PPT and pre-recorded lecture on NCOTA- both updated annually).		Stacey and Beth		
13. Create a sustainable system to target students/new grads for membership by: (1)identifying ways to provide entry level support to students post graduation and (2) exploring creation of a webpage that would directly support students / entry level practitioners, and (3) collect information from students on barriers to membership.		Hannah- mental health Membership - Anna and Brittni Stacey and Beth - Education and Research	continued from 2024 Anna- working to find ways to improve value to student to participate in NCOTA Stacey- NCOTA has some information about barriers that they can share	
14. SIS chairs submit at least 2 posts per year to support contribution to social media posts and ensure that content is diverse and reflective of members' needs and interests in their represented area.		Nichole C- create content calendar and support SIS contributions to social media throughout the year Hannah- mental health Kayleigh F	continued from 2024 Kayleigh- I have the list from Nichole and I am emailing the SIS chairs monthly to ask for this content	
14. Explore website options and present to the board.		Debb and Brittany Jennifer L		
15. Decide what website platform is best and transition if needed for cost, accessibility and member functions)		Debb and Brittany Jennifer L		
16. Create an email sequence for new members, near expiring, and recently expired members. <ul style="list-style-type: none"> Each would be a mini series of emails that automatically go out. include gathering information from those choosing not to renew as well Card declined email? 		Membership Anna D, Brittni W, and Brittany R		
17. Update Financial SOP for Treasurer Role and Financial Processes.		Jennifer- Treasurer Brittany R- supporting	Working with the bookkeeper and	

		Financial committee supporting	accountant, tax processes are changing,	
18. Create an organizational chart showing hierarchy, roles and responsibilities of each section of the board.		Debb leading Clarice supporting		
19. DEI toolkit to be finalized and placed on the website.		Julius leading	Collecting resources, need to add to the website	