

ILOTA STRATEGIC PLAN 2019 - 2021

VISION

ILOTA is a multifaceted association committed to enhancing health and well-being through the utilization of best occupational therapy practices in Illinois.

MISSION

ILOTA is recognized as the premier occupational therapy resource in Illinois. We strive to advance the best practice of occupational therapy through serving, supporting and promoting the profession.

CORE VALUES

- **Be Dynamic:** We are an ever-evolving association that serves as a catalyst, promoting health and well-being by inspiring compassionate, enthusiastic occupational therapy practitioners. Through forward thinking we envision the need for change and innovation.
- **Be Inclusive:** We represent practitioners within current and emerging practice areas across Illinois to ensure every voice is heard. We embrace diversity and acknowledge the need to support growth and development of all practitioners within the state.
- **Be Dedicated:** We are dedicated to the advancement of occupational therapy and our stakeholders. We need self-motivated people who are passionate about the occupational therapy profession
- **Have Integrity:** We value ethical practice by our members which in turn drives the organizations adherence to ethical business practice. In light of our advocacy role, it is critical that our profession is viewed as trustworthy through modeling of our core values.

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STRATEGIC FOCUS AREAS

Focus Area 1 (Membership): Have our members feel welcome, valued, and understood. Provide resources that members experience as valuable and necessary to do their best work.

Focus Area 2 (Finance): Act in a financially responsible way to ensure long-term stability and growth. Communicate financial decisions openly with members.

Focus Area 3 (Advocacy): Establish a powerful and effective network to advocate for Occupational Therapy practitioners, services, and clients.

Focus Area 4 (Communication): Be a preferred source for information, collaboration, support, and guidance related to Occupational Therapy in the State of Illinois. Communicate openly, effectively, and respectfully to our members.

Focus Area 1 (Membership): Members will feel welcome, valued, and understood. ILOTA will provide resources that members experience as valuable and integral to doing their best work.

Progress Measures:

- 1. Membership Growth (numbers, diversity, percentage of state practitioners)**
- 2. Member Satisfaction Rating (Average of 4.5 or greater on 1-5 scale)**

Reporting Responsibility: Director of Membership

	Objective	Project Title	Actions	Status
1.1	Members rate ILOTA continued education and event experiences as meaningful, effective, and satisfying.	Standard CE Rating Tool	Establish a standard rating tool and procedure for rating ILOTA events.	NOT INITIATED
1.2	Increase member awareness and ease of access to member benefits.	Concise Description and Access of Member Benefits	Create a brief overview of membership benefits.	ACTIVE

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			Improve clarity, organization, and access to member benefits on the website.	
1.3	Establish a consistent procedure to interact with members based on their membership status	Procedure for Membership Contact	<p>First time members will be contacted to express our appreciation.</p> <p>New members (1-5) years will be contacted quarterly to express our appreciation and ask for their input about how their membership experience could be improved.</p> <p>Established members (6 years or more) will be contacted once a year to express our appreciation and explore their interest in engagement opportunities.</p> <p>Lapsed members will be contacted on a pre-determined schedule to communicate ILOTA news and invite to join.</p>	ACTIVE
1.4	Expand participation and improve quality of SIS	SIS Experience	Completion of an SIS survey.	COMPLETED
1.5	Explore options to collaborate with other state organizations to support member involvement in conference and CE resources	State Alliance and Collaboration	Complete a study and report of the potential benefits, steps, timeline, resource requirements, and potential risks or barriers to collaboration with other state organizations.	INITIATED, NOT ACTIVE
1.6	Improve systems for coordinating and recognizing volunteers	Volunteer Coordination and Recognition Proposal	Present recommendations to the executive board	NOT INITIATED
1.7	Establish a method to track and measure important factors related to membership growth	Membership Analytics	Identify important member factors to track. Create tools and processes to track factors established.	NOT INITIATED

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1.8	Establish a standardized method for gathering and analysing participant satisfaction related to ILOTA events	Standard Event Rating Tool	Create a standard Member Satisfaction Survey and process.	INITIATED, NOT ACTIVE.
1.9	Update ILOTA Branding	Logo Update	Coordinate process of updating ILOTA logo including participation of members in selection and rollout to maximize engagement opportunities.	ACTIVE: 3 options in review.

Focus Area 2 (Finance): ILOTA will act in a financially responsible ways to ensure long-term stability and growth. ILOTA will communicate its financial status and decisions openly with members.

Progress Measures:

1. 5% Revenue Growth
2. Expand CE participation
3. Expand strategic relationship with businesses (number, diversity, revenue)

Reporting Responsibility: Director of Finance

	Objective	Project Title	Actions	Status
2.1	Expand options and participation in live and online CE events including LMS, Conference, and Courses	LMS Development	Establish 2 CE resources on LMS	ACTIVE
		CE Contract	Create a documents and procedures for establishing contract agreements for CE and ILOTA hosted events	INITIATED
2.2	Streamline financial records and reporting	Financial Procedure Review and Revision	Evaluate and revise current financial records	ACTIVE

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			Recommend changes to procedures, use of technology, or contracting services.	
2.3	Improve communication of financial information to members (frequency, simplicity, clarity)	Financial Transparency and Communication	Create a simple chart that visually communicates use of membership dues.	NOT INITIATED
2.4	Expand strategic relationships with universities, corporations, businesses, and non-profits who provide sponsorship and/or add value to ILOTA members	Business Development	Increase conference sponsors by 3 Increase participation of non-profits by 3	ACTIVE
2.5	Establish a method to track and measure CE participation.	CE Tracking Proposal	Propose method to board	NOT INITIATED
2.6	Establish a method to track and measure strategic relationships with businesses.	Business Relationship Analytics Proposal	Propose method to board	NOT INITIATED

Focus Area 3 (Advocacy): ILOTA will establish a powerful and effective networks, relationships, and methods to advocate for Occupational Therapy practitioners, services, and clients.

Progress Measures:				
1. Number of members assuming key roles related to advocacy				
2. Number of districts in which members have established strategic relationships with representatives				
Reporting Responsibility: Director of Advocacy				
	Objective	Project Title	Actions	Status
3.1	Develop strategic relationships in each district in Illinois between ILOTA members and their representatives	Strategic Relationships with Representatives	Create a document that identifies a variety of methods people can use to establish strategic relationships with their representatives	NOT INITIATED

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			Identify members in 10 different districts who express interest in establishing strategic relationships with their representative.	
3.2	Improve communication and responsiveness of ILOTA to legislative events	Legislative Communication Proposal	<p>Complete a proposal about how to best move forward in creating procedures to improve communication and response to legislative events.</p> <p>Establish online tool for entering zip code and identifying member representatives</p>	INITIATED
3.3	Identification of priority advocacy relationships and events ILOTA should consider developing	Priority Strategic Relationship Proposal	Evaluate and propose collaborations and events that ILOTA should consider pursuing (e.g. - ILOTAPAC, Hill Day, OT Month Event, Fundraisers, Alliance with other professional organizations)	NOT INITIATED
3.4	Explore the potential to create a collaborative alliance with other professional boards (PT, SP...).	Collaborative Alliance	Initiate conversation with people who have collaborated on recent advocacy for EI practice about the potential to expand and formalize our collaborative relationship in other areas of advocacy.	NOT INITIATED

Focus Area 4 (Communication): Be a preferred source for information, collaboration, support, and guidance related to Occupational Therapy in the State of Illinois by communicating openly, effectively, and respectfully to our members, and by creating user friendly platforms to promote interactions.

Progress Measures:

1. Increased activity and engagement on social media
2. Increased activity and engagement on blog

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- 3. Increased open rates on newsletter**
4. Member Satisfaction Rating (Average of 4.5 on 1-5 scale)

Reporting Responsibility: Director of Communication

	Objective	Project Title	Actions	Status
4.1	Establish a consistent posting schedule for social media.	Social Media Posting Schedule	Create and track consistency with a posting schedule	UNKNOWN
4.2	Launch blog and coordinate with Communique	Blog Development and Coordination	Reorganized communique team sharing or establishing new resources for the blog team. Establish publishing schedules and procedures to meet deadlines.	ACTIVE
4.3	Establish procedures for effective use of e-mail (frequency, type, branding, targeting specific audiences...)	Proposal for procedure / decision tree related to use of different communication formats	Propose procedures for effective use of email with members.	ACTIVE
4.4	Improve knowledge and use of technology (Zoom, WebClicks, LMS, Conference App...)	Technology Awareness	Complete formal / informal continued education and share with executive board.	ACTIVE

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