

ILOTA STRATEGIC PLAN 2022 - 2025

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 organization's 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: Inclusion / Diversity

Focus Area 2: Membership

Focus Area 3: Organizational Structure

Focus Area 4: Communication

Focus Area 5: Support of Best Practice

Focus Area 1: Inclusion and Diversity

Focus Area Description: We are striving to be an organization that is welcoming to all Illinois OT practitioners, students, and related stakeholders and makes efforts to enhance cultural effectiveness, diversity, inclusion, and equity within the profession.				
Item Number	Reporting Responsibility	Objective	Actions	Contributing Full Board Members
1.1	President	Increase opportunities for members to engage in various volunteer and educational events related to inclusion and diversity	<ul style="list-style-type: none"> ● Organize at least 2 webinar/town hall/CE events on topics of inclusion and diversity each year. ● Collaborate with local COTAD chapters at IL OT and OTA programs on at least one initiative each year ● By December 2022, implement a middle school/high school outreach program to increase awareness of OT as a possible career choice among diverse youth. ● By August 2023, implement an OT preparation mentorship program for diverse youth. 	

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1.2	DOA	Develop equitable representation and advocacy throughout the state	<ul style="list-style-type: none"> ● Maintain strategies to recruit representatives from throughout the state on various task forces and committees ● Maintain strategic advocacy relationships on a yearly basis 	
1.3	DOC	Ensure diverse representation in all communications	<ul style="list-style-type: none"> ● Include diverse authors in each issue of the Communique newsletter ● Highlight a diverse topic monthly on social media ● Share the diversity work of ILOTA quarterly on social media ● Maintain “Ask JEDI” column in all future Communique issues 	
1.4	DOM	Promote diverse membership on the board and sub-committees	<ul style="list-style-type: none"> ● Each executive board election cycle, employ strategies to recruit diverse nominees for the election slate ● Send out volunteer recruitment messages at least two times per year to all members ● By August 2023, complete a demographic survey of all board and committee members ● By August 2024, using demographic survey results, create a plan for identifying and inviting underrepresented individuals to serve on the board/committees 	
1.5	President	Improve accessibility of ILOTA communications, events, and education	<ul style="list-style-type: none"> ● By December 2022 establish a clear standard process for requesting accommodations for events/offerings ● Engage in annual accessibility audit of the website and other communications ● Ensure use of alt text on images in Communique, social media, and other communications ● Ensure use of automatic closed captioning for live virtual events ● Ensure use of automatic closed captioning for all recorded videos 	

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Focus Area 2: Membership

Focus Area Description:				
We are striving to increase the number of members, the value of membership, and promote engagement of our members in organizational activities.				
Item Number	Reporting Responsibility	Objective	Actions	Contributing Full Board Members
2.1	DOM	Increase member engagement in SIS groups/committees	<ul style="list-style-type: none"> ● Maintain collaboration amongst SIS coordinators to share ideas and promote development of the SIS roles. ● By August 2023 develop a plan for monthly highlights of SIS initiatives ● By August 2023 explore feasibility of using online forums through the ILOTA website to promote virtual networking amongst SIS members 	
2.2	DOA	Maintain ILOTA networks to support advocacy	<ul style="list-style-type: none"> ● Continue advocacy framework/structure for linking SIS coordinators or other ILOTA members to legislation. When legislation is introduced pertaining to specific practice areas: <ol style="list-style-type: none"> 1. Begin with lobbyist feedback (she often knows details about the legislation unknown to laypeople) 2. Provide lobbyist feedback and link to legislation to SIS coordinators or other members for their input 3. Take SIS coordinator/member input to lobbyist for further steps as needed 	

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2.3	DOM	Develop methods to increase membership	<ul style="list-style-type: none"> ● By January 2023, finalize and implement fieldwork program for IL OTA and OT schools ● By January 2023 establish schedule to reach out to graduating OTA and OT students as they prepare to transition from student to new practitioner in order to support membership retention ● By February 2023 explore group membership pricing and marketing to employers ● By February 2023 create a one page graphic illustrating key benefits of membership ● By August 2023 collaborate with DOC to create a plan to improve consistency and effectiveness of communication to drive membership. ● Host promotional booth at minimum of one healthcare conference/fair per year. ● Implement a yearly membership drive 	
2.4	DOM	Develop methods for maintaining membership	<ul style="list-style-type: none"> ● Maintain Leadership Development Program ● Maintain raffle of AOTF event tickets for members ● By January 2023 develop onboarding process for new ILOTA members ● By January 2023 implement standard procedures for connecting with members on regular intervals ● By January 2023, establish monthly schedule to contact members lapsed 30+ days personally to remind about renewal and membership benefits ● By August 2023 develop methods to celebrate membership milestones ● By August 2023 develop a plan for gathering regular member feedback (through surveys, town halls, etc.) ● By August 2023, explore member raffle of free course audits of courses approved by CE Approval Committee 	

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			<ul style="list-style-type: none"> By August 2024 implement annual member appreciation events/initiatives 	
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Focus Area 3: Organization and Structure

<p>Focus Area Description: We are striving to enhance the efficiency of the organization by improving the processes, policies, and procedures used by its board and members.</p>				
Item Number	Reporting Responsibility	Objective	Actions	Contributing Full Board Members
3.1	DOA	Maintain use of standardized structure for responding to advocacy issues (organizational structure for advocacy department)	<ul style="list-style-type: none"> Maintain processes for interaction between DOA and various stakeholder groups <ol style="list-style-type: none"> Follow schedule for meeting with Public Policy Coordinator and Reimbursement Follow PAC role and responsibilities within legal guidelines Set meeting schedules with SIS chairs for updates on issues in each practice area and feedback from vetting legislation 	

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3.2	Secretary/ President	Clarify policies, procedures, and position descriptions for all ILOTA Executive and Full Board members	<ul style="list-style-type: none"> ● By August 2023 establish a document review timeline ● Make annual updates to the ILOTA Board Manual ● Ensure review and appropriate updates/revisions completed for all documents on an annual basis ● Clarify procedures about how to maintain functions for vacant positions ● Update onboarding process for new board and committee members ● Create formal debriefing process for events 	
3.3	DOF	Maintain standardized budget processes for all events	<ul style="list-style-type: none"> ● By August 2023, recategorize budget items and tracking software to meet current needs of organization ● Maintain use of budget request forms by all board members 	
3.4	President	Maintain development of and reference to strategic plan	<ul style="list-style-type: none"> ● Make edits to strategic plan on an annual basis as necessary ● Maintain use of annual board member goal forms ● Maintain use of quarterly board reports 	

Focus Area 4 : Communication

<p>Focus Area Description: We are striving to improve communication to enhance organizational functions, promote awareness, and increase engagement of members and the larger community.</p>				
Item Number	Reporting Responsibility	Objective	Actions	Contributing Full Board Members

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4.1	DOA	Maintain communication and responsiveness of ILOTA to legislative events	<ul style="list-style-type: none"> ● By August, 2023 create format for an advocacy corner on ILOTA website documenting and sharing legislation and other topics (see chart) ● Reach out to more members to join advocacy efforts related to changes in licensure Act and Rules. 	
4.2	DOF	Maintain financial transparency communication to ILOTA members	<ul style="list-style-type: none"> ● Continue use of financial reporting template for membership that is available on the ILOTA website, published quarterly ● Continue use of budget request template for general membership program ideas 	
4.3	DOA	Maintain collaborative advocacy alliances with other states and professions	<ul style="list-style-type: none"> ● Engage in ongoing dialogue with collaborative partners on shared interests/issues ● Engage in communication with AOTA and other state affiliates on issues as needed 	
4.4	DOC	Maintain communication of most important aspects and updates about ILOTA to members using all communication tools	<ul style="list-style-type: none"> ● Collaborate with website coordinator to ensure website content remains updated/relevant ● Ensure board members send relevant updates to Executive Director and/or Director of Communications to be shared via appropriate communication channels 	

Focus Area 5 : Support of Best Practice

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Focus Area Description: We are striving to facilitate understanding and use of evidence-informed best practices across practice settings in Illinois through education, advocacy, and networking.				
Item Number	Reporting Responsibility	Objective	Actions	Contributing Full Board Members
5.1	DOM	Establish mentoring programs through SISs to support new grads, practitioners transitioning to new practice settings, or practitioners returning to practice	<ul style="list-style-type: none"> ● By August 2023, identify gaps/needs for practitioners to see what they want from ILOTA ● By August 2024, create guidelines and procedures for mentors/mentoring programs ● By January 2025, identify individuals to serve as mentors 	
5.2	DOF	Provide quality CE opportunities related to best practice	<ul style="list-style-type: none"> ● Provide at least one free CE opportunity per quarter ● Continue yearly CE plan for ILOTA ● Explore creation and implementation of one-day conferences on targeted practice areas/topics ● Increase CE content available on demand through the LMS ● Maintain annual conference ● Maintain annual student conclave 	

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5.3	President	Provide increased opportunities for networking and town hall discussions on administrative and practice issues	<ul style="list-style-type: none"> ● Plan and schedule at least two town halls each year ● Plan at least one quarterly networking event for targeted groups each year 	
5.4	DOM	Enhance library of SIS resources available on website	<ul style="list-style-type: none"> ● By January 2023, identify SISs that have not added resources to develop a plan for creating and adding resources ● By August 2023, create a yearly plan for auditing and updating resources as needed 	