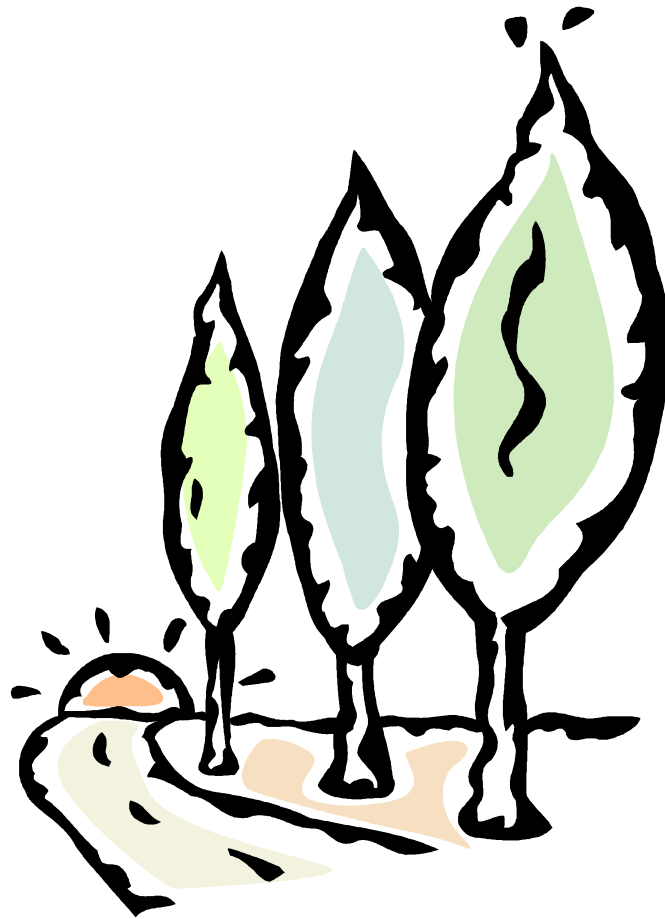


MAOT Strategic Plan



2012-2015

Introduction

The Massachusetts Association for Occupational Therapy provides a professional network for its members and works to develop and support the occupational therapy profession. MAOT strives to meet the continuing education needs and interests of occupational therapy practitioners, to represent the profession to the public, and to promote access to occupational therapy. MAOT serves people interested in occupational therapy, be they individual consumers or their family members, occupational therapy practitioners, or our internal/external stakeholders inclusive of special interest groups, and interdisciplinary collaborators.

MAOT is a volunteer organization run by its members and requires member participation in order to remain effective. MAOT is committed to meeting the needs of its constituents and our partners in the delivery of occupational therapy services throughout Massachusetts. To do so, the organization works to provide leadership and direction to move the profession forward within the context of the ongoing changes inherent in the practice environment.

The 2012-2015 MAOT strategic plan has the overarching goal of increasing alignment between National, Regional and State occupational therapy visions and endeavors. This strategic plan was developed by a process that included ongoing reviews of the 2008-2011 plan by the MAOT Executive Board, a town meeting with members and others in attendance at the 2011 Annual Business Meeting held in October 2011. The Ad Hoc Strategic Planning Committee (SPC) summarized the information using a Strength, Weakness, Opportunity, Threat (SWOT) analysis. After examining the analysis, four overlapping and connected themes emerged including: communication, membership, research and revenue. The 2012-2015 strategic plan encompasses three goals aimed at defining who, what and how of the organization.

Summary of Goals

Goal #1: (Who) Build community by connecting MAOT with occupational therapy practitioners, academicians, students, consumers and related groups. (Review annually in March)

Goal#2: (What) Build credibility with MAOT efforts to promote advocacy and linkages between research, education, practice and policy. (Review annually September)

Goal #3: (How) Build resources by increasing organizational outputs and outcomes through workforce enhancements and strengthened fiscal stability of MAOT. (Review Annually in June)

Implementation

The Strategic Planning Committee recommends the Executive Board review structure of current committees, roles and responsibilities and to: consider establishment of new standing committees to contribute to the attainment of the initiatives laid out in this plan. In addition this committee strongly recommends that the Executive Board develop a method with individuals responsible to track the MAOT 2012-2015 Strategic Plan progress and make modifications over time. The format of the strategic plan includes a tracking table to be used as a framework to review and identify progress towards attainment. This committee recommends that the Executive Board set aside time on a quarterly basis throughout each year of the implementation phase of the strategic plan to discuss, measure and summarize the progress and process towards attainment of the action plans.

Respectfully Submitted:

Mary Alicia Barnes, OTR/L, Tufts University, Member

Gail Bloom, OTD, MA, OTR/L, Member

Karen Hefler, OTR/L, MAOT Executive Board Member, Legislative Representative

Mary Malone, MS, OTR/L, MAOT Executive Board Member, Alternate Representative to RA

Diane Makovsky, BSJ, OTS, Bay Path College, Member

Diane Maxson, MHA, MS, OTR/L, MAOT Executive Board Member, Reimbursement Representative

Ellie Meyer, MS, OTR/L, MAOT Executive Board Member, Publications Representative

Lori Vaughn, OTD, MS, OTR/L, MAOT Executive Board Member, Academic Representative

MAOT Strategic Plan 2013-2015 Tracking

Goal # 1 (Who): Build community by, MAOT with connecting occupational therapy practitioners, academicians, students, consumers and related groups.

Action Step: 1.1 Increase MAOT membership/ recruit members.	Ongoing Action	Periodic Review Comments
<p>A. Contact employers for outreach to potential OT/OTA members.</p> <ol style="list-style-type: none"> 1. Contact large employer for town meetings, offer in-services re: how to submit proposals, etc. 2. Explore ways to collaborate with employers, Program Directors, & AFCs to gather information regarding employment and fieldwork data. 3. Annual recognition of employers with % of membership (include full range from single private practitioner to large facilities). 	<p>Achieved: _____ (date)</p> <p>Revised: _____ (date)</p>	
<p>B. Encourage OT/OTA student membership.</p> <ol style="list-style-type: none"> 1. Develop ways to encourage student membership with recruitment campaigns via college/university student newspapers, or other forums (SOTA club meetings, Town meetings, FW Coordinators, Program Directors). 2. Annual recognition to school with highest % student membership. 	<p>Achieved: _____ (date)</p> <p>Revised: _____ (date)</p>	

Goal #1 (continued)

Action Step: 1.1 Increase MAOT membership/ recruit members. (continued)	Ongoing Action	Periodic Review Comments
<p>C. Explore different membership types & special incentives.</p> <ol style="list-style-type: none"> 1. Recruit academic programs & other institutional sponsors. 2. Evaluate viability of “special discounts” to increase revenue (or at the least be cost neutral): sustained membership discount (e.g., 20 year plus gets 5% discount), group member rates, student-practitioner member to correspond with academic year, new practitioner rate, April is OT Month special. 	<p>Achieved: _____ (date)</p> <p>Revised: _____ (date)</p>	
<p>D. Advertise & promote member benefits in high profile spots using modern media techniques.</p>	<p>Achieved: _____ (date)</p> <p>Revised: _____ (date)</p>	

Goal #1 continued

ACTION STEP 1.2. Increase involvement, retain members to generate support and boost membership participation.	Ongoing Action	Periodic Review comments
A. Awareness Campaign: Video clips of “Why I am an MAOT member”, news blasts regarding what MAOT did for you lately.	Achieved: _____ (date) Revised: _____ (date)	
<p>B. Explore ways to structure and share tasks assumed by executive board members to allow ease of delegation of tasks, dissemination of knowledge, and to foster member participation in the organization and future volunteerism on the executive board.</p> <p>1. Structure and analyze volunteer roles & leadership opportunities. 2. Examine need for mentor project to foster leaders.</p>	Achieved: _____ (date) Revised: _____ (date)	
C. Encourage student involvement.	Achieved: _____ (date) Revised: _____ (date)	

Goal #1 continued

ACTION STEP 1.2. Increase involvement, retain members to generate support and boost membership participation. (continued)	Ongoing Action	Periodic Review Comments
<p>D. Contact academic programs to promote MAOT and MAOT activities (lobbying, education offerings, and other benefits of membership) for current students and alumni.</p> <p>1. Seek MAOT student reps from OT/OTA programs from each educational institution to report to Academic Rep serving as liaison to Executive Board to bring forth interests, concerns/issues.</p>	<p>Achieved: _____ (date)</p> <p>Revised: _____ (date)</p>	
<p>E. Develop a mentoring program for members.</p>	<p>Achieved: _____ (date)</p> <p>Revised: _____ (date)</p>	

Goal #1 continued

ACTION STEP 1.3. Facilitate communication and increase accessibility to connect in a responsive fashion to all constituents including MAOT members, MAOT potential members, and occupational therapy consumers.	Ongoing Action	Periodic Review Comments
<p>A. Identify method for determining # of and type of practice areas for all occupational therapy and occupational therapy assistant providers (Allied Health Board, NBCOT, and Bureau of Labor Statistics).</p> <p>1. Develop database of email/phone/fax contacts for all occupational therapy practitioners working and/or living in the state (member/non-member). 2. Expand use of electronic, web-based & social media in keeping with current electronic media practices (webcast, conference recordings, and interviews to showcase material, to respond to questions or need for assistance from members, potential members and consumers in a timely manner, with follow-up request for membership and/or support as appropriate.</p>	<p>Achieved: _____ (date) Revised: _____ (date)</p>	
<p>B. Evaluate overall effectiveness, member preference, & financial efficiencies of using diverse communication methods such as: Email, Website, Facebook, Pinterest, podcasts, phone-a-thon, and other.</p>	<p>Achieved: _____ (date) Revised: _____ (date)</p>	
<p>C. Examine conference registration forms to see if we are collecting contact information from non-members make changes to forms as necessary to gather data (and obtain their permission to contact).</p>	<p>Achieved: _____ (date) Revised : _____ (date)</p>	

ACTION STEP 1.3. Facilitate communication & increase accessibility to connect in a responsive fashion to all constituents including MAOT members, potential members, & consumers. (continued)	Ongoing Review	Periodic Action Comments
<p>D. Enhance website.</p> <ol style="list-style-type: none"> 1. Maintain up-to-date content and systems(s) to maintain currency of content. 2. Establish regular schedule and implement periodic timeframe to review content. 3. Maintain member-only section of website. 4. Utilize Facebook & website to gather input. <ol style="list-style-type: none"> a. To assess satisfaction with services and benefits (communication systems, conferences, SIG's). b. To identify needs & priorities for future planning (legislative & regulatory changes, reimbursement, etc.) 	<p>Achieved: _____ (date)</p> <p>Revised: _____ (date)</p>	

GOAL 2: (What) Build credibility to promote advocacy and linkages between research, education, practice, and policy.

ACTION STEP 2.1. Promote the idea of evidence-based practice (EBP) as an integral part of clinical reasoning for OT practice.	Action Date	Action Comments
<p>A. Foster application of occupation & EBP</p> <p>1. Establish routes for researchers to reach or collaborate with practitioners</p> <p>2. Encourage practitioners to use and share EBP in practices; share information; communicate EBP through MAOT communication opportunities</p>	<p>Achieved: _____ (date)</p> <p>Revised: _____ (date)</p>	
<p>B. Integrate EBP education, initiatives & resources via special interest groups (SIGs) meetings & activities</p>	<p>Achieved: _____ (date)</p> <p>Revised: _____ (date)</p>	
ACTION STEP 2.2. Facilitate collecting of an Outcomes Database	Action Date	Action Comments
<p>A. Add a research /EBP section to the website to post and share qualitative and quantitative research posters, Power Point links, podcasts of conference workshops, practitioner /student research papers, and case studies.</p>	<p>Achieved: _____ (date)</p> <p>Revised: _____ (date)</p>	

GOAL 3: (How) Build resources: Increase organizational outputs and outcomes through workforce enhancements & strengthened fiscal stability of MAOT.

ACTION STEP 3.1 Clarify & publicize organization's need for revenue and meet operating operation costs.	Ongoing Action	Periodic Action Comments
A. Evaluate & establish a variety of dues payment & membership renewal options (e.g., payment plan with monthly payments or quarterly installments, multiple year memberships, early renewal discount).	Achieved: _____ (date) Revised: _____ (date)	
B. Utilize membership data for fiscal year-end report (e.g., use revised membership form and recruitment campaigns results to assess effectiveness of recruitment methods and to compile an annual membership report) specifying type of membership (OTR, COTA, student, retired practitioner), method of recruitment, & motivating factors for joining).	Achieved: _____ (date) Revised: _____ (date)	
C. Find comparative data for a market analysis of OT association (and other comparable professional associations) membership rates to assess if rate increases are warranted (regional New England, New Jersey, New York, & other similar states).	Achieved: _____ (date) Revised: _____ (date)	

Goal #3 continued

ACTION STEP 3.2 Oversee ongoing financial activities of the association & allocate revenue responsibly to ensure financial viability.	Ongoing Action	Periodic Review Comments
<p>A. Increase revenues within our current endeavors, adequately forecast expenses in these endeavors and take steps into new activities to generate additional revenue streams (e.g., explore methods to increase revenue via diversified sources: advertisements, MAOT books/products, continuing education offerings, fundraising efforts, corporate/other fundraising efforts, grant writing, charge small fee for website employer job posting or agency advertising including but limited to OT/OTA educational programs, expand external institutional support, as well as CE advertising, assisting vendors in the sale of OT related products).</p>	<p>Achieved: _____ (date) Revised: _____ (date)</p>	
<p>B. Expand financial goals associated with continuing education opportunities. 1. Explore viability of offering additional CE programs/services in partnerships with CE providers.</p>	<p>Achieved: _____ (date) Revised: _____ (date)</p>	

Goal #3 continued

ACTION STEP 3.2 Oversee ongoing financial activities of the association & allocate revenue responsibly to ensure financial viability. (continued)	Ongoing Action	Periodic Review Comments
<p>C. Evaluate effectiveness of structural changes related to roles of treasurer, accountant, and financial planner.</p> <ol style="list-style-type: none"> 1. Clarify role of Treasurer in regards to bookkeeping budgeting, financial analysis, communication/relationships with accountant & financial planner, frequency and regularity of reporting. 2. Monitor and provide periodic updates to Executive Board regarding status of revenue streams and expenses, investment accounts and all significant financial decision-making). 	<p>Achieved: _____ (date)</p> <p>Revised: _____ (date)</p>	