

# ILOTA STRATEGIC PLAN 2020 - 2023

## 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 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	Status Completed Initiated Not Initiated
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"> <li>● Organize at least 2 webinar/town hall/CE events on topics of inclusion and diversity each year.</li> <li>● Collaborate with local COTAD chapters at IL OT and OTA programs on at least one initiative each year</li> <li>● By August 2021, create a middle school/high school outreach program to increase awareness of OT as a possible career choice among diverse youth.</li> <li>● By August 2022, create an OT preparation mentorship program for diverse youth.</li> </ul>	

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1.2	DOA	Develop equitable representation and advocacy throughout the state	<ul style="list-style-type: none"> <li>● By December 2021 Identify lead members in each district to develop strategic relationships with district representatives</li> </ul>	
1.3	DOC	Ensure diverse representation in all communications	<ul style="list-style-type: none"> <li>● Include diverse authors in each issue of the Newsletter</li> <li>● Highlight a diverse topic monthly on social media</li> <li>● Share the diversity work of ILOTA quarterly on social media</li> </ul>	
1.4	DOM	Promote diverse membership on the board and sub-committees	<ul style="list-style-type: none"> <li>● By August 2021 create procedures for outreach, recruitment, elections, etc. that promote inclusive practices</li> </ul>	
1.5	President	Improve accessibility of ILOTA communications, events, and education	<ul style="list-style-type: none"> <li>● By August 2020 create an inclusivity philosophy to guide the organization</li> <li>● By August 2021 improve the accessibility of the ILOTA website for all users</li> <li>● By August 2021 establish a process to add closed captioning to all videos uploaded to the LMS</li> <li>● By August 2021 establish a clear standard process for requesting accommodations for events/offerings</li> <li>● By August 2022 explore use of closed captioning or interpreter services during live virtual events</li> </ul>	

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## Focus Area 2: Membership

<b>Focus Area Description:</b> <b>We are striving to increase the number of members, the value of membership, and promote engagement of our members in organizational activities.</b>				
Item Number	Reporting Responsibility	Objective	Actions	Status Completed Initiated Not Initiated
2.1	DOM	Increase member engagement in SIS groups/committees	<ul style="list-style-type: none"> <li>● By August 2021 collaborate with SIS chairs to share ideas and promote development of the SIS role.</li> </ul>	
2.2	DOF	Provide relevant and meaningful CE opportunities as a membership benefit	<ul style="list-style-type: none"> <li>● By December 2020, engage CE committee to investigate what types of CE the membership wants</li> <li>● By September 2021, provide at least one free CE opportunity per quarter</li> <li>● By September 2021, create a yearly CE plan for ILOTA</li> </ul>	
2.3	DOF	Increase CE opportunities throughout the year through the LMS	<ul style="list-style-type: none"> <li>● By December 2020 establish a procedure for CE approval and contract agreement for ILOTA LMS content producers</li> <li>● By September 2021, have new content posted or hosted quarterly for a total of at least 4 per year</li> <li>● By September 2022, LMS will have at least 20 CE opportunities</li> </ul>	

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2.4	DOM	Develop methods to increase membership	<ul style="list-style-type: none"> <li>● By February 2021 explore group membership pricing and marketing to employers</li> <li>● By February 2021 create a one page graphic illustrating key benefits of membership</li> <li>● By August 2021 collaborate with DOC to create a plan to improve consistency and effectiveness of communication to drive membership.</li> <li>● Host promotional booth at minimum of one healthcare conference/fair per year.</li> </ul>	
2.5	DOM	Develop methods for maintaining membership	<ul style="list-style-type: none"> <li>● By August 2021 develop standard procedures for connecting with members on regular intervals.</li> <li>● By August 2022 develop methods to celebrate membership milestones.</li> </ul>	

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## Focus Area 3: Organization and Structure

<b>Focus Area Description:</b> We are striving to enhance the efficiency of the organization by improving the processes, policies, and procedures used by its board and members.				
Item Number	Reporting Responsibility	Objective	Actions	Status Completed Initiated Not Initiated
3.1	DOA	Create standardized structure for responding to advocacy issues (organizational structure for advocacy department)	<ul style="list-style-type: none"> <li>● By December, 2021 develop processes for interaction between DOA and various stakeholder groups</li> </ul>	
3.2	Secretary	Clarify policies, procedures, and position descriptions for all ILOTA Executive and Full Board members	<ul style="list-style-type: none"> <li>● By December 2020 organize &amp; consolidate all ILOTA documents into common place for all Board access.</li> <li>● Establish a document review timeline.</li> <li>● Ensure review and appropriate updates/revisions completed for all documents on an annual basis,</li> <li>● Finalize update of orientation process</li> <li>● By January 2021 revisit board structure and make/vote on updates as appropriate</li> <li>● Implement standardized procedures for social media, Newsletter, and blog workflows</li> <li>● Clarify procedures about how to maintain functions for vacant positions</li> </ul>	

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3.3	DOF	Standardize budget processes for all events	<ul style="list-style-type: none"> <li>● By August 2021, Create budget templates for all yearly events</li> <li>● By December 2020, recategorize budget items and tracking software to meet current needs of organization</li> </ul>	
3.4	President	Update/reformat website in collaboration with DOC	<ul style="list-style-type: none"> <li>● By November 2020, form a workgroup to analyze current website, investigate desired features of other websites, and make recommendations for improvement to website</li> <li>● By February 2021, explore possible partnerships with web developers and gather quotes for services</li> <li>● By July 2021, roll out new website</li> </ul>	

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## Focus Area 4 : Communication

<b>Focus Area Description:</b> We are striving to improve communication to enhance organizational functions, promote awareness, and increase engagement of members and the larger community.				
Item Number	Reporting Responsibility	Objective	Actions	Status Completed Initiated Not Initiated
4.1	DOA	Improve communication and responsiveness of ILOTA to legislative events	<ul style="list-style-type: none"> <li>● By February, 2021 create online tutorial for witness slips</li> <li>● By February, 2021 create process to identify impactful legislative events</li> <li>● By February, 2021 create response process to impactful legislative events</li> <li>● By August, 2021 create format for an advocacy corner on ILOTA website</li> </ul>	
4.2	DOF	Improve financial transparency communication to ILOTA members	<ul style="list-style-type: none"> <li>● By December 2020, Create financial reporting template for membership that is available on the ILOTA website, published quarterly</li> <li>● By February 2021, Create budget request template for general membership program ideas</li> </ul>	



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4.3	DOA	Develop collaborative alliances with other states and professions	<ul style="list-style-type: none"> <li>● By April, 2021 create document: Director of Advocacy in each state and working issues</li> <li>● By August, 2021 create document: Director of Advocacy for other Illinois professions (SLP, PT, SW, etc.)</li> <li>● By December, 2021 engage with above professions to identify shared interests</li> </ul>	
4.4	DOC	Communicate most important aspects and updates about ILOTA to members using all communication tools	<ul style="list-style-type: none"> <li>● By September 2020, establish reporting procedures with each Board Member</li> </ul>	