

axxum
CONSULTING



Illinois
Occupational
Therapy
Association

Strategic Plan

ILOTA

2024-2027

www.axxumconsulting.com

Mission, Vision, Values

Mission

ILOTA is a multifaceted organization committed to promoting and advocating for the occupational therapy profession and supporting practitioners and students in the pursuit of quality and ethical services in Illinois.

Vision

ILOTA is the premier occupational therapy resource in Illinois.

Values

Be Dynamic

We serve as a catalyst for promoting health, well-being, and participation in an ever-evolving society. Through forward thinking we embrace change and innovation.

Be Inclusive

We welcome and celebrate all individuals in all that we do.

Be Dedicated

We are active and collaborative participants in the advancement of occupational therapy. We are self-motivated people who are passionate about the occupational therapy profession.

Be Ethical

We adhere to ethical standards in all of our efforts. It is critical that we demonstrate integrity and are viewed as trustworthy.

Implementation Plan

#	Focus Area	Initiative Name	Owner	Support (resources)	Timeline	Estimated Duration*	Level of Effort (L, M, H)
1	Advocacy	1.1 Recruit and train a lobbyist 1.2 Continue support of OT practice Act & Administrative rules 1.3 Schedule meetings once a quarter when in session with key legislators who have advocacy goals	<ul style="list-style-type: none"> Director of Advocacy 	<ul style="list-style-type: none"> Financial Time for training Task force of volunteers SIS committee 	<ul style="list-style-type: none"> By summer 2025 By December 2025 By December 2025 	<ul style="list-style-type: none"> 1 year Ongoing Ongoing 	<ul style="list-style-type: none"> H M H
2	Membership	2.1 Annual membership survey 2.2 Resurrect student liaison committee by June 2025 2.3 Identify opportunities to engage students and new practitioners to become members	<ul style="list-style-type: none"> Director of membership 	<ul style="list-style-type: none"> ED Members Financial incentives for completion Academic community Student committee Director of communication Social media Job opportunities OT/OTA local programs 	<ul style="list-style-type: none"> Once a year, implement in April/May Analyze by June budget planning Fiscal year By April 2025 	<ul style="list-style-type: none"> 1 year Ongoing Ongoing 	<ul style="list-style-type: none"> M M M
3	Education	3.1 Co-chair conference structure with VP & staggering terms to ensure transition 3.2 Provide consistently 10-12 educational opportunities per year across state 3.3 Enhance functionality of LMS for virtual course offerings	<ul style="list-style-type: none"> Director of Finance ED CEU coordinator 	<ul style="list-style-type: none"> Explore external event company Volunteers CE coordinator Course presenters Facilities Method of courses (online, live) Director of communication Volunteer support 	<ul style="list-style-type: none"> By January 2025 By August 31st, 2025 By August 31st, 2025 	<ul style="list-style-type: none"> TBD Ongoing 3 months 	<ul style="list-style-type: none"> H H H
4	Governance	4.1 Create a succession plan 4.2 Evaluate and revise by-laws & organizational chart of executive and full board 4.3 Set up a task force of 2-3 board members to reassess and recommend SIS restructure	<ul style="list-style-type: none"> President Director of membership 	<ul style="list-style-type: none"> Executive Board ED (to create SOPs) Current org chart Bylaws committee Task force Revised bylaws Members feedback SIS chair 	<ul style="list-style-type: none"> Summer 2025 By December 2025 By March 2025 	<ul style="list-style-type: none"> 1 year 6 months 1-2 years 	<ul style="list-style-type: none"> H H H
5	Finance	5.1 Re-evaluate fiscal year 5.2 Create sustainable financial plan by analyzing trends and creating goals 5.3 Create an investment policy to protect financial assets of ILOTA	<ul style="list-style-type: none"> Director of finance Bev/George 	<ul style="list-style-type: none"> Executive Board Accountants Online resources ED Bylaws committee 	<ul style="list-style-type: none"> By summer 2025 By August 31st, 2025 By December 2025 	<ul style="list-style-type: none"> 1 year Ongoing 6 months 	<ul style="list-style-type: none"> H H M

2024

2025

2026

2027

2027

Advocacy

1.1 Recruit and train a lobbyist

1.2 support of OT practice Act & Administrative rules

1.3 Schedule meetings once a quarter with legislators

2.1 Annual membership survey

2.2 Resurrect student liaison committee by June 2025

2.3 Identify opportunities to engage students and new practitioners to become members

3.1 Co-chair conference structure with VP & staggering terms to ensure transition

3.2 Provide consistently 10-12 educational opportunities per year across state

3.3 Enhance functionality of LMS for virtual course offerings

4.1 Create a succession plan

4.2 Evaluate and revise by-laws & org chart of executive and full board

4.3 Set up a task force of 2-3 board members to reassess and recommend SIS restructure

5.1 Re-evaluate fiscal year

5.2 Create sustainable financial plan by analyzing trends and creating goals

5.3 Create an investment policy to protect financial assets of ILOTA

Membership

2024 Strategic Planning

Education

Governance

Finance