

Rhode Island Occupational Therapy Association
July 11, 2004
SWOT Analysis

Strengths:

- Committed Board
- Longevity
- Good relationship with AOTA
- RA is good liaison to AOTA
- Newsletter
- Peds SIS very active
- Leadership in peds is very strong
- Financially sound
- Financial support from members
- Treasurer and budget
- Better events over the past year
- Pilot program as an administrative assistant went well
- Better delegation

Weaknesses:

- Not Enough People
- Board Participation
- Some SIS groups have dissolved – lack of membership
- Impact of rolling membership is uncertain
- Follow up on membership forms
- Numbers/membership has decreased
- No administrative assistant
- Tracking existing membership
- Web site is not updated and is unknown to most members
- No formal place/time to meet
- Decreased value of belonging to RIOTA or professional organizations

- Difficulty filling board positions
- Organization of documents and materials
- Follow up

Opportunities:

- Capitalize on peds
- Use forms/other methods to survey members and increase involvement/membership
- Get more students involved during their education and post graduation
- Hire someone to maintain website using connections
- One minute update – use secretary for this
- Board effort to organize document/materials
- Do a few things well rather than a lot of things not so well
- First membership meeting to welcome new OTs into the profession/organization
- Get new blood
- Use of letter to new members during membership drive from president
- Informing members on current issues in OT

Threats:

- PT/ST encroachment
- Other people doing OT
- Loss of identity in OT
- Reimbursement
- Job competition
- Higher education standards

Summary:

As a board we have issues to address in the following 4 categories:

1. administration
2. membership
3. communication
4. resources

**Rhode Island Occupational Therapy Association
Strategic Plan: 2004 -**

Administrative

Goal #1: Meet the needs of the membership in a proactive, efficient, and timely manner.

Objective	Strategy	Time Line	Budget	Who
1. Define Needs	1. Design and distribute questionnaires/Survey to asses satisfaction of meetings/events including determining what members would like to change about their state organization.	1. Complete survey by 1/06. Distribute 2/06. Analyze results and use for end of year goal setting in 5/06	1. Approx. \$50. if surveys require direct mail	1. Vice President
2. Reorganize Board	2. Define the structure (how many positions and their titles) of the board; Nominations for new positions and new candidates; Define the descriptions and contributions for each board position in detail	2. 9/05	2. \$0.	2. President
3. Improve Policy/procedures	3. Review and update bylaws for current policies and procedures including which policies/procedures are necessary and which ones are obsolete. Determine process for regular review of bylaws.	3. 9/ 05 and ongoing	3. \$0.	3. President

Membership

Goal #2: Increase and maintain membership.

Objective	Strategy	Time Line	Budget	Who
1. Buy list from State	1. Obtain free list of licensed OT practitioners in RI. Send membership form and letter to all non-members. Mail/e-mail invite to one additional event during the year.	1. 8/05 and ongoing	1. \$100. if mailings are needed	1. President, Admin. Assistant
2. Mentorship Programs	2. Inform members of benefits of mentorship in partnership with NBCOT benefits and contact hours. Newsletter articles encouraging mentorship relationships formalized through RIOTA. Develop role of mentorship chair or exec board member responsible for coordinating (Possibly VP)	2. 1/06 and ongoing	2.0. if in newsletter	2. Mentorship Chair/Vice President
3. Membership drive/ welcoming party for new members	<p>3A. Once a new member pays, send a receipt for payment via e-mail or mailed letter from president including the information that all members are welcome at board meetings.</p> <p>3B. During September General Membership meeting recognize new members and provide special gift to each new member.</p>	<p>3A. 9/05</p> <p>3B. Every September</p>	<p>3A. \$30.</p> <p>3B. Not to exceed \$5.00 for each new member</p>	<p>3A. President and Admin. Assistant</p> <p>3B. Public Relations chair</p>

<p>4. Outreach to occupational therapy schools</p>	<p>4. Draft letter to schools in surrounding states to get students involved before or as they are graduating. Send letter via e-mail attachment to schools identified. Mail to schools that request hard copies.</p>	<p>4. Complete letter by 3/05. Mail out one time per year via e-mail/postage by April 1st of each year.</p>	<p>4. \$30.</p>	<p>4. Secretary</p>
<p>5. Membership booklet</p>	<p>5 .Develop membership book for all RIOTA members to use as resource to aid in mentorship opportunities.</p>	<p>5. 9/06</p>	<p>5.Printing + postage (or send by e-mail)</p>	<p>5.Admin. Assistant and President</p>
<p>6. Revise membership form</p>	<p>6A.Have membership form available for down load or direct submission on website. 6B. Revise membership form to reflect current needs of organization.</p>	<p>6A. 4/05 6B. 1/05</p>	<p>6A. None 6B. None</p>	<p>6A. Web Master 6B. Treasurer</p>
<p>7. Member cards</p>	<p>7. Provide all RIOTA members with membership card including expiration date and other important information.</p>	<p>8. 9/06</p>	<p>7. Not to exceed \$1.00 per card</p>	<p>7. Admin. Assistant and Treasurer</p>

Communication

Goal #3: Use multimedia approach to communication and others regarding OT issues

Objective	Strategy	Time Line	Budget	Who	
1. Communicate to and from members and potential members	1A. Establish and maintain a RIOTA Website	1A. 9/05	1A. \$200.	1A. Webmaster	
	1B. Newsletter 3x per year	1B. Ongoing	1B.	1B. Newsletter chair	
	1C. Develop Email list of members for distribution of quick turnover information.	1C. 10/05	1C. None	1C. Admin. Assistant	
	1D. Develop workplace visits rotation schedule	1D. 1/06	1D. None	1D. President	
	1E. Investigate need for phone tree	1E. 1/06	1E. None	1E. Secretary and Admin. Assist.	
	1F. Develop Fax list to reach members	1F. 10/05 and ongoing	1F. None	1F. President and Admin. Assistant	
	1G. Include Newsletter guidelines including submission requirements/expectation in by-laws	1G. 9/05	1G. None	1G. Newsletter Chair	
	2. Communication to and from consumers	2A. Update consumer page on website to include specific clinical sites	2A. 1/06	2A. None	2A. Webmaster
			2B. 9/06		
		2B. Choose one project per year to		2B. TBD	2B. PR Chair

<p>3. Communicate to and from legislature</p> <p>4. Communicate to and from media</p> <p>5. Communicate to and from other disciplines/ allied health professionals</p>	<p>help educate potential consumers about occupational therapy</p> <p>3A. Maintain lobbyist</p> <p>3B. Determine relevant legislative committees and meet with them regarding OT agenda; preparation for updating practice act.</p> <p>4. Education resource coordinator role to include education and publication of the role of OT by securing radio and TV opportunities at least once per year.</p> <p>5. Contact PT/ST state associations to for informal discussion on joint issues. Find neutral issues to establish relationship.</p>	<p>3A. 7/05 and ongoing</p> <p>3B. 7/05 and ongoing</p> <p>4. 1/06</p> <p>5. 1/06</p>	<p>3A.</p> <p>3B.</p> <p>4. None</p> <p>5.None</p>	<p>3A. RA</p> <p>3B. RA</p> <p>4. Education Resource Coordinator</p> <p>5.President</p>
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Resources

Goal #4: Develop resources to assist board with set goals and objectives

Objective	Strategy	Time Line	Budget	Who
1. Administrative Assistant	1A. Expand the role of Admin. Assistant by conducting a time study to obtain work hours and percent based work per area	1A. 9/05	1A. 0.	1A. Admin. Assistant
	1B. Administrative Assistant to disseminate e-mails 2 weeks before and again a few days before upcoming meetings and events (including peds)	1B. 8/05 and ongoing	1B. 0.	1B. President and Admin. Assistant
2. Library	2. Develop a safe and central location for all RIOTA members to access archival and current information.	2. 9/06	2.TBD	2.President
3. Phone Line	3. Investigate the possibility of using a cell phone for central RIOTA hotline	3. 9/05	3.TBD	3.President
4. Develop Educational Resources Coordinator role	4A. Develop job description for position.	4A. 8/05	4A. 0.	4A. Ed. Resource Coordinator