



STRATEGIC PLAN 2019-24



JUNE 2019 through JUNE 2024

FOTA STRATEGIC PLAN 2019-24

VISION STATEMENT

FOTA represents occupational therapy practitioners in promoting best practice and in meeting the occupational needs of consumers and the community.

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MISSION

FOTA partners with its members, clients and the communities it serves in supporting practice, education and advocacy based on science and evidence.

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CORE VALUES

Our core values support and promote practice that is rooted in:

1. Occupation
2. Client- and family-centered care
3. Community
4. Leadership
5. Advocacy
6. Ethics
7. Scholarship
8. Diversity
9. Mentorship
10. Global connectivity
11. Lifelong learning
12. Interprofessionalism
13. Occupational justice
14. Evidence

Operational definitions with references are provided at the end of this document.

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Strategic Plan Goals

(Each goal is subject to review and approval based on fiscal implications and impact on relevant organizational bylaws.)

Finance

Long Term Goal	Short Term Goal	Responsibility	Target Date
1. Use financial planning strategies to assist in the achievement of association's ongoing goals	1a. Develop financial materials and forms to correspond with activities related to association's ongoing goals	Treasurer and voting board members	6/20
	1b. Enact policies, procedures, and timeframes for the spending of organizational funds 1c. Provide education on spending policies and outcome measures to board members, coordinators, and committee chairs	Treasurer and voting board	6/20
	1d. Connect all budget proposals directly to goals of the strategic plan	Voting Board and ad hoc chairs	6/20
	1e. Determine volunteer expenses to support association activities	Voting Board	6/20

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	1f. Identify marketing, education, technology, and communication needs for possible funding	Voting Board	6/20
2. Increase all streams of revenue to ensure solvency of the organization.	2a. Identify viable and sustainable revenue streams	President and voting board	6/20
3. Ensure financial transparency through providing information on organizational expenses and income	3a. Disseminate organization's financial information at board meetings, annual conference and in organizational publications	Treasurer	6/20

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Governmental Affairs

Long Term Goal	Short Term Goal	Responsibility	Target Date
1. Create a stronger presence with the FL legislature	1a. Identify and support legislators who promote inclusion of occupational therapy in FL health care	GA	Ongoing
	i. Support FOTA members to arrange visits with state legislators in their home districts (2 visits)	GA, E board Region reps	2020-21

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	<p>1b. Create an annual legislative agenda aimed at moving occupational therapy forward</p> <p>i. Obtain suggestions from SIS chairs</p> <p>ii. Create a link on FOTA webpage for government concerns feedback for members</p> <p>iii. Development of a GA sub-committee within FOTA to work toward future agenda items</p> <p>iv. Recruits a social media GA committee member to disseminate info regarding work of committee through FOCUS and e-blasts</p>	<p>SIS Chair and GA</p> <p>SIS Chair and GA</p> <p>Janine, GA</p> <p>GA and E board</p> <p>GA and E board</p>	
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	<p>1c. Develop ways to raise awareness and call to action to promote the agenda</p> <p>i. Work with FLASHA and FPTA toward improved Medicaid coverage and reimbursement</p> <p>ii. Work toward member awareness of reporting of Medicaid and other insurance coverage issues</p> <p>iii. Increased member awareness of benefit of FOTA and the role of GA within the organization</p>	<p>GA Committee And FOTA Board</p>	<p>Ongoing</p>
	<p>1d. Increase GA budget for marketing copies- for Corcoran, Buttons, shirts, name tags for e-board members</p>	<p>GA, Treasurer</p>	<p>2019</p>

Leadership

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Long Term Goal	Short Term Goal	Responsibility	Target Date
1. Increase/maintain number of new volunteers, mentors, and leaders for the Florida Occupational Therapy Association matching volunteer strengths and interests with association volunteer needs	1a. Provide multiple events and activities per year for the education and recruitment of new volunteers, mentors and leaders	The Leadership Development Committee and Volunteers Coordinator and the Nominations Committee	6/20
	1b. Acknowledge volunteers, mentors, and leaders at the end of their term of service through publications and ceremonies at the annual conference	Recognitions Committee and Volunteer Coordinator	6/20
	1c. Promote awareness of volunteer, mentorship, and leadership opportunities through publications, website, Twitter, Facebook, Instagram, and local forums	Association Coordinator, Volunteer Coordinator, Leadership and Nominations Committees	6/20

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	1d. Acknowledge and celebrate the long-term contributions of individuals to the success of FOTA through yearly awards ceremonies at conference and publication of the accomplishments of the awardees on all media communication platforms	Awards Committee	6/20
	1e. Recruit at least 2 candidates for each of the eligible elected positions in the yearly elections and maintain a full roster of regional reps, committee chairs, coordinators and roles with the organizational chart	The Leadership Development Committee and Volunteers Coordinator and the Nominations Committee	6/20
	1f. Encourage each current board member, chair and representative to nominate 1 new candidate per election cycle	The Leadership Development Committee and Volunteers Coordinator and the Nominations Committee	6/20
2. Develop and implement strategies for emerging practice or societal issues	2a. Identify emerging practice and other societal issues and create ad hoc committees for addressing these issues as a state organization	President and voting board members	6/20

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Continuing Education

Long Term Goal	Short Term Goal	Responsibility	Target Date
1. Maximize opportunities for evidence-based practice, lifelong learning, scholarship sanctioned as continuing education courses by the association	1a. Offer no less than two continuing education courses delivered face-to-face or online taught by reputable instructors	VP & PSC Coordinator	Spring & Summer 2021
	1b. Charge an ad hoc group to investigate the feasibility of virtual conference attendance	VP & Conference Committee	Report in early 2020

Scholarship

Long Term Goal	Short Term Goal	Responsibility	Target Date
1. Empower students and practitioners to engage in scholarly endeavors while utilizing theoretical and practice evidence in providing best practice results	1a. Create a searchable database of FOCUS articles for members	Administrative Associate & Practice Standing Committee (PSC)	Launch Spring 2020
2. Rebrand the FOCUS Newsletter to become a	2a. Rename the publication as FOCUS Quarterly	Executive Board	Launch 2021

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scholarly publication	2b. Expand article submission categories to include book reviews, product fact sheets, critical descriptions of new products, CAPS, CATS, Scoping Reviews, etc	FOCUS Editor & PSC	Launch Spring 2021
	2c. Recruit a board of peer reviewers for the more formal submission categories	Volunteer Coordinator, FOCUS Editor & PSC Coordinator	Launch Summer of 2020

Membership

Long Term Goal	Short Term Goal	Responsibility	Target Date
1. FOTA membership increases to 6% of licensed occupational therapy practitioners	1a. Communicate the clear value of FOTA membership as part of the marketing strategy	Membership Committee (MC)	6/20
	1.b Implement a marketing strategy for students who transition to practitioners	Membership Committee (MC)	6/20
	1.c Create a marketing strategy to recruit new and retain existing members	Membership Committee (MC)	6/60
	1d. Report the results of marketing strategies on membership recruitment and retention no less	Membership Committee (MC) and Association	6/20

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	than biannually.	Coordinator	
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Operational Definitions of Core Values

1. OCCUPATION: Occupation refers to the activities that people engage in everyday as individuals, groups, and populations to occupy time and bring meaning and purpose to life. These include daily activities such as self-care, rest and sleep, education, work, play, leisure, and social participation. Occupations include things people need to, want to and are expected to do.

American Occupational Therapy Association. (2014). Occupational therapy practice framework: Domain and process (3rd Edition). *American Journal of Occupational Therapy*, 68(Supplement 1), S1-S048. doi: 10.5014/ajot.2015.682006

World Federation of Occupational Therapy. (n.d.) Definition of Occupational Therapy. Retrieved July 26, 2018 from <http://www.wfot.org/aboutus/aboutoccupationaltherapy/definitionofoccupationaltherapy.aspx>

2. CLIENT- & FAMILY-CENTEREDNESS: By collaborating with people across the lifespan and in a variety of contexts aimed toward optimal health and well-being, occupational therapy practitioners provide services that are client and family-centered. Individuals and families define their “family” and determine how they will participate in care and decision-making. A key goal is to promote health, well-being, and participation in meaningful occupations while focusing on client safety, optimal outcomes, and system improvement.

3. COMMUNITY: Communities encompass individuals who share ideals and values, while also promoting and developing the group members involved. FOTA provides a community in which like-minded individuals share ideals and a common goal, while also networking with one another for the well-being of the clients they serve.

Riby, P., Trentham, B., & Letts, L. (2014). Modifying performance contexts. In B. Boyt Schell, G.Gillen, & M.E.Scaffa (Eds.) Willard and Spackman’s Occupational Therapy (12th ed.) (pp.364-381). Philadelphia, PA: Lippincott Williams & Wilkens.

4. LEADERSHIP: As a volunteer organization, FOTA views leadership as the ability and process that directs relationships grounded by interests, commitments, resources, and environments while recognizing that complexities transform into mutually beneficial results.

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Dunbar, S., B. (2015). Leadership theories. In Dunbar, S., B. & Winston, K. (Eds.). *An occupational perspective on leadership: Theoretical and practical dimensions, Second Edition (pp.1 -14)*. Thorofare, NJ: Slack

Ganz, M. (2010). *Leading change: Leadership, organization, and social movements*. Boston, MA: Harvard Business Press.

Wheatley, M. J. (2006). *Leadership and the new science: Discovering order in a chaotic world*. Oakland, CA: Berrett-Koehler Publishers.

5. ADVOCACY: Advocacy is the act of empowering occupational therapy practitioners and their clients to publicly support and impact a particular cause or policy that seeks to protect and promote access to resources, foster equity, and support justice.

Advocate [Def.1]. (n.d.). In *Merriam Webster Online*. Retrieved July 26, 2018 from <https://www.merriam-webster.com/dictionary/advocate>

American Occupational Therapy Association. (2014). Occupational Therapy Practice Framework: Domain and Process (3rd Edition) *American Journal of Occupational Therapy*, 68(Supplement 1), S1-S048. doi:10.5014/ajot.2015.682006

6. ETHICS: FOTA upholds the principles and standards of conduct, as well as core values, outlined in the AOTA Code of Ethics. AOTA's core values include: "(1) Altruism, (2) Equality, (3) Freedom, (4) Justice, (5) Dignity, (6) Truth, and (7) Prudence" (AOTA, 2015, p. 2). The principles and standards of conduct include: "(1) Beneficence, (2) Nonmaleficence (3) Autonomy (4) Justice, (5) Veracity, and (6) Fidelity" (AOTA, 2015, p. 2). We hold these tenets to be the foundation for providing services to clients and the community, professional decision-making, and conducting ourselves as ethical practitioners in all aspects of occupational therapy.

American Journal of Occupational Therapy. (2015). Occupational therapy code of ethics. *American Journal of Occupational Therapy*, 69(Supplement 3), 6913410030p1-6913410030p8. doi: 10.5014/ajot.2015.696S03

7. SCHOLARSHIP: Scholarship is a multi-faceted occupation where practitioners engage in a continuous pursuit of knowledge and learning through formal and informal approaches. Occupational therapy practitioners can explore and apply the best evidence for practice through searching for information, routinely measuring outcomes, engaging in research, and sharing such knowledge while teaching others.

Boyer, E. L. (1990). *Scholarship reconsidered: Priorities for the professoriate*. Lawrenceville, NJ: Princeton.

8. DIVERSITY: Diversity is a dynamic interaction of all factors that define the individual's identity and allows engagement and participation within society. FOTA acknowledges that diversity is related to differences of individuals within an organization or society and supports a profession that accepts and embraces diversity.

Taff, S.D., & Blash, D. (2017) Diversity and inclusion in occupational therapy: Where we are, where we must go. *Occupational Therapy in Health Care*, 31(1), 72-83. doi:10.1080/07380577.2016.1270479

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World Federation of Occupational Therapy. (2010). World federation of occupational therapists position statement on diversity and culture. Retrieved from WFOT_Position_Statement_Diversity_and_Culture_CM2010_UpdatedJuly2010

9. MENTORSHIP: Mentorship is a formal or informal relationship &/or process that occurs between a seasoned or experienced person and a willing learner or between peers with a mutually agreed purpose of professional, personal growth or both.

Lachter, L. R., & Ruland, J. P. (2018). Enhancing leadership and relationships by implementing a peer mentoring program. *Australian Journal of Occupational Therapy*, 65(4), 276-284. doi: 10.1111/1440-1630.12471

Mentorship. (2018). In Oxford Dictionary Online. Retrieved from: <https://en.oxforddictionaries.com/definition/mentorship>, 09.03.2018

10. GLOBAL CONNECTIVITY: Global Connectivity fosters collaborations among individuals, communities, and populations through technological and other means, including the exchange of science, evidence, and socio-cultural issues. Connectivity results in cultural understanding, support, motivation, and inspiration of all participants toward positive action that impacts and facilitates occupation throughout the world.

Clark, F. (2013). As viewed from above: Connectivity and diversity in fulfilling occupational therapy's Centennial Vision (Farewell Presidential Address). *American Journal of Occupational Therapy*, 67, 624-632. <http://dx.doi.org/10.5014/ajot.2013.676003>

11. LIFELONG LEARNING: FOTA supports occupational therapy practitioners in being lifelong learners from their time as students and through their professional practice years. We promote professional development through academic, scholarship, and leadership activities by providing resources, continuing education, and innovative opportunities for ongoing knowledge acquisition and translation.

American Journal of Occupational Therapy. (2015). Standards for continuing competence. *American Journal of Occupational Therapy*, 69(Supplement 3), 6913410055p1-6913410055p3. doi: 10.5014/ajot.2015.696S16

12. INTERPROFESSIONALISM: Described as a “partnership between a team of professionals and clients in a participatory, collaborative, and coordinated approach,” interprofessionalism results in shared decision-making around common concerns for engagement and sustained participation in occupations. FOTA actively seeks interprofessional partnerships in achieving its strategic goals and advancing the profession.

Canadian Interprofessional Health Collaborative (2010, February). *A national interprofessional competency framework*. Retrieved from: https://www.cihc.ca/files/CIHC_IPCompetencies_Feb1210.pdf

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13. OCCUPATIONAL JUSTICE: Occupational justice provides fair and equal opportunities for individuals to enable them to reach their full potential as occupational beings and to exercise self determination and autonomy. Aligning with this, FOTA supports actions that promote occupational justice for individuals of all ages, gender, abilities, and other factors in personal, professional and community contexts.

American Occupational Therapy Association. (2014). Occupational therapy practice framework: Domain and process (3rd Edition). *American Journal of Occupational Therapy*, 68(Supplement 1), S1-S048. doi: 10.5014/ajot.2015.682006

Townsend, E., & Wilcock, A.A. (2004). Occupational justice and client-centered practice: A dialogue in progress. *Canadian Journal of Occupational Therapy*, 71(2), 75-87.

14. EVIDENCE: Evidence is the body of information that validates whether or not a theory or an intervention is representative of best practice that produces optimal results for our clients and the community. As practitioners, we use timely, critically appraised literature and professional reasoning for collaborative client and family-centered care. FOTA promotes evidence-based practice in providing high quality services and producing functional and cost-effective outcomes.

Taylor, R. (2017). *Kielhofner's research in occupational therapy: Methods of inquiry for enhancing practice*. Philadelphia, PA: F.A. Davis Company.

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- Advocate [Def.1]. (n.d.). In *Merriam Webster Online*. Retrieved July 26, 2018 from <https://www.merriam-webster.com/dictionary/advocate>
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- American Journal of Occupational Therapy. (2015). Standards for continuing competence. *American Journal of Occupational Therapy*, 69(Supplement 3),6913410055p1-6913410055p3. doi: 10.5014/ajot.2015.696S16
- American Occupational Therapy Association. (2014). Occupational therapy practice framework: Domain and process (3rd Edition). *American Journal of Occupational Therapy*, 68(Supplement 1), S1-S048. doi: 10.5014/ajot.2015.682006
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- Mentorship. (2018). In Oxford Dictionary Online. Retrieved from: <https://en.oxforddictionaries.com/definition/mentorship>, 09.03.2018
- Riby, P., Trentham, B., & Letts, L. (2014). Modifying performance contexts. In B. Boyt Schell, G.Gillen, & M.E.Scaffa (Eds.) Willard and Spackman's Occupational Therapy (12th ed.) (pp.364-381). Philadelphia, PA: Lippincott Williams & Wilkens.
- Taff, S.D., & Blash, D. (2017) Diversity and inclusion in occupational therapy: Where we are, where we must go. *Occupational Therapy in Health Care*, 31(1), 72-83. doi:10.1080/07380577.2016.1270479
- Taylor, R. (2017). *Kielhofner's research in occupational therapy: Methods of inquiry for enhancing practice*. Philadelphia, PA: F.A. Davis Company.
- Townsend, E., & Wilcock, A.A. (2004). Occupational justice and client-centered practice: A dialogue in progress. *Canadian Journal of Occupational Therapy*, 71(2), 75-87.
- Wheatley, M. J. (2006). *Leadership and the new science: Discovering order in a chaotic world*. Oakland, CA: Berret-Koehler Publishers.
- World Federation of Occupational Therapy. (2010). World federation of occupational therapists position statement on diversity and culture. Retrieved from WFOT_Position_Statement_Diversity_and_Culture_CM2010_UpdatedJuly2010

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World Federation of Occupational Therapy. (n.d.) Definition of Occupational Therapy. Retrieved July 26, 2018 from <http://www.wfot.org/aboutus/aboutoccupationaltherapy/definitionofoccupationaltherapy.aspx>