KENTUCKY OCCUPATIONAL THERAPY ASSOCIATION

STRATEGIC PLAN

2025- 2027

The mission of KOTA is to:

- Serve the interests of the membership,
- Promote access to occupational therapy services, and
- Represent the profession to the public

Our vision is to be an evolving, proactive and diverse organization that supports our mission by meeting the needs of our membership through advocacy in legislative issues, reimbursement issues, and consumer issues, promoting quality educational opportunities, providing diverse practitioners communities of engagement, and seeking to improve the use of evidenced based practice to enhance therapeutic opportunities for the clients our membership serves.

The Association's Board has identified the following strengths, weaknesses, opportunities, and threats which are addressed by this strategic plan.

Areas of Strengths	Areas of Opportunities
*Historical presence *Strong ties to academic programs *Historical ties to key legislators *Committed leadership/Executive Board	*Expanding reach and disseminating information through virtual platforms *Demonstrating value of membership through marketing initiatives *Developing programs to renew lapsed membership and gain membership from those not currently members *Developing member engagement through educational programming, special interest groups, and building social media communities *Engaging, supporting, and mentoring student membership and leadership *Creative fundraising opportunities using virtual and face-to-face platforms *Develop a long range economic growth plan
Areas of Need	**Areas of Potential Threats**
*Membership engagements *Membership retention and growth *Leadership mentoring and recruitment of future leaders *OTA community engagement *No historical plan to promote and recruit diversity in practitioners or leadership *Lack of economic growth *Poor efficiency and consistency in maintaining historically relevant information (archives).	*Not engaging, developing, and/or retaining students as they evolve into practitioners and future leaders *Complacency on the part of membership and board *Infringement issues from other professions *Lack of economic growth or marketing plan *Lack of long range association and economic planning (5 years, 10 years) *Effortful fundraising leading to leadership burn-out.

Area of Strategic Focus: Education (President; Vice-President; District Chairs; Education Chair)						
Objective/s	**Action Items Needed to Achieve Objective**	**Persons Responsible/Duties**	**Timeline for achievement**	**Evaluation Criteria**	**Date Reviewed by Committee/President**	**Score:** **1: Achieved** **2: Progressing on Schedule** **3: Initiated** **4: Not Initiated** **For all scores other than 1, provide a narrative**
Host annual KOTA student conference or Student Track at KOTA Annual Conference	Work with planning committee to plan conference, set conference dates, communicate with OT/OTA schools to support student needs, execute conference	Education Chair and Committee	Annually by the end of September (2025, 2026, 2027)	Student Conference Evaluation		
Host quarterly KOTA District meetings	Secure speakers for each district on a quarterly basis	District Chairs	Quarterly	CEU Evaluation		
Plan and Host KOTA Annual Conference	1) Establish conference theme 2) Set event date 3) Obtain facility approval and/or sign contract 4) Establish key committees: peer review, registration, vendor hall, set up/take down, AV, refreshment/entertainment/ socializing, awards ceremony/special events, marketing, membership incentives, student workers 5) Set host hotel and sign contract for established rate 6) Select and confirm Keynote speaker	Vice President and Committee	Annually in September (2025, 2026, 2027)	Conference Evaluation		

	7) Revise and send out call for papers 8) Revise vendor info and solicit vendors 9) Set schedule 10) Inform those submitting Call for Papers of approval, approved with changes, or declined 11) Assign rooms/times for presentations and proctors, develop online course eval for each course 12) Plan gifts/letters of thanks for presenters 13) Go over duties with room proctors 14) Coordinate with ways and means chair for door prizes & layout of vendor hall 15) Set up conference rooms, registration, hospitality, vendor hall; make sure someone has brought the boxes for registration and hospitality from TJ Sampson Hospital prior to setup 16) Inform presenters where the hospitality room is located 17) Take down conference and clean up 18) Review course evaluations and send results to presenters 19) Send out conference survey and relate the results with the KOTA Executive Board 20) Tally conference attendance, total					

	expenditures, and profits with Executive Board					
Additional Educational Seminars	Explore opportunities for new educational seminars and maintain/update current offerings (DPAMs, Suicide Prevention)	President and Exec Officers				

Area of Strategic Focus: OTA Involvement and Leadership Development (President; OTA Chair; Membership Chair)						
Objective/s	**Action Items Needed to Achieve Objective**	**Persons Responsible/Duties**	**Timeline for achievement**	**Evaluation Criteria**	**Date Reviewed by Committee/President**	**Score:** **1: Achieved** **2: Progressing on Schedule** **3: Initiated** **4: Not Initiated** **For all scores other than 1, provide a narrative**
Engage the Kentucky OTA community	Explore option for implementation of OTA SIS group.	OTA Chair	Ongoing			
Increase membership from the Kentucky OTA community	Work with membership to increase OTA members	OTA Chair; Membership Chair	Ongoing			
Engage and retain OTA students as they graduate and transition to new practitioners	Survey OTA/OTAS	OTA Chair, Office Administrator, President, Membership Chair	Ongoing			
Increase OTA student membership	Engage with Kentucky OTA Educational Programs to understand the needs of OTA students. Increase engagement of students in these programs.	Education Chair, Student Rep, OTA Chair, Membership Chair	May 2025 2026, 2027	Student Membership Numbers		

Area of Strategic Focus: Membership Development and Retention (student, practitioner) All Executive Board Members						
Objective/s **Problems which need action:** ● **Disengaged membership** ● **Need to increase membership**	**Action Items Needed to Achieve Objective**	**Persons Responsible/Duties**	**Timeline for achievement**	**Evaluation Criteria**	**Date Reviewed by Committee/President**	**Score:** **1: Achieved** **2: Progressing on Schedule** **3: Initiated** **4: Not Initiated** **For all scores other than 1, provide a narrative**

• **Need to engage young practitioners as members** • **Increase retention rate from student to practitioner**						
Engage or re-engage membership	Membership Drive focusing on individuals with lapsed membership; Making contact with individuals who utilize KOTA services (ie: Suicide Prevention), but are not members.	Membership Chair and Committee, Office Administrator	Quarterly updates	Increase in membership numbers; conversion rate of disengaged members to members		
Increase new members	Investigate and develop give-aways, raffles of goods, merchandise, membership Develop survey	Membership Chair and Committee	Quarterly updates	Increase in membership numbers		
Engage young practitioners to become members	Engage through social media	President, Executive Board, Marketing Chair	Quarterly updates	Social media followers, likes, shares, etc.; number of postings across all social media platforms		
Engage and promote KOTA membership to students	Plan events/opportunities to make KOTA more visible and involved (ie: Tri-Alliance Day). KOTA leadership visits educational programs/student organizations.	Student Rep, Membership Chair, Education Committee, Legislative Chair	Annually	Number of promotion events conducted		
Retain students as they transition to practitioners	Utilize student survey results to develop action items for increasing retention of students as they become practitioners	Student Rep, Membership, Education Committee, President	Annually	Retention rate of graduated students as they transition to practitioners		

Area of Strategic Focus: Economic Stability President, Treasurer, Marketing Chair, Membership Chair, Ways and Means						
Objective/s	**Action Items Needed to Achieve Objective**	**Persons Responsible/Duties**	**Timeline for achievement**	**Evaluation Criteria**	**Date Reviewed by Committee/President**	**Score:** **1: Achieved** **2: Progressing on Schedule** **3: Initiated** **4: Not Initiated** **For all scores other than 1, provide a narrative**
Increase business sponsorships/advertisements	Advertise the ability for employers/businesses to advertise to our members via email, conferences, and on social media (ie: job openings)	Treasurer, Ways and Means	December 2025	1. Fifteen sponsorships /advertisements from employers or businesses		
Develop a marketing strategy to communicate the value of KOTA to Increase number of memberships by 50 members	Advertise and education on the benefits of KOTA membership; Survey members/non-members	President, Executive Board, Marketing Chair	December 2025	1.Increase baseline number of members by 50 members		
Increase revenue opportunities by providing more continuing education courses	Develop creative single-day educational courses with a focus on educational opportunities that provide passive income.	President, Vice President, Executive Board,	December 2025	1.Increase baseline number of continuing education courses by 2		
Develop a fundraising plan that includes all districts.	Identify fundraising opportunities that can be easily repeatable and implement them across all districts	President, Treasurer, Ways and Means, District Chairs	Annually (December 2025, 2026, 2027)	One fundraising event per district annually		

Area of Strategic Focus: Association and Professional Diversity (Practice Chair; District Chairs)						
Objective/s	**Action Items Needed to Achieve Objective**	**Persons Responsible / Duties**	**Timeline for achievement**	**Evaluation Criteria**	**Date Reviewed by Committee/President**	**Score:** **1: Achieved** **2: Progressing on Schedule** **3: Initiated** **4: Not Initiated** **For all scores other than 1, provide a narrative**

Maintain formal communication of information between KBLOT & KOTA	Attend KBLOT meetings and report items of interest to KOTA Board	Practice Chair	Ongoing	1. 80% attendance of KBLOT meetings 2. Significant information reported to KOTA Board		

Area of Strategic Focus: Promotion of Occupational Therapy and Association (President, Marketing Chair, District Chairs, Nominations Chair,)						
Objective/s	**Action Items Needed to Achieve Objective**	**Persons Responsible/Duties**	**Timeline for achieve-ment**	**Evaluation Criteria**	**Date Reviewed by Committee and President**	**Score:** **1: Achieved** **2: Progressing on Schedule** **3: Initiated** **4: Not Initiated** **For all scores other than 1, provide a narrative**
Produce quarterly Newsletter		Marketing Chair	Quarterly	Number of newsletters produced will be equal to or greater than 4 annually		
Promote OT through an OT month activity		District Chairs, All members Executive Board	April (2025, 2026, 2027)	KOTA will hold 1 or more OT month activities for April annually		
Recruit board members and association positions	Fill open positions	Nominations Chair, President, Executive Board Members	Ongoing	End of fiscal year, # of open positions counted; track number of contacts made		
Promote and expand upon current SIS Program Offerings	Communicate with SIS Programs to understand needs, Market current SIS	President, SIS Chairs, Vice President	Ongoing	SIS Quarterly Updates		

	programs to expand participation, Explore opportunities for new SIS programming.					
Explore Student Capstone and Fieldwork opportunities to focus on KOTA growth and development.	Communicate with OT/OTA Educational Programs to identify capstone and fieldwork needs.	President; Membership Chair	Annually	Host 1 Capstone and/or FW student annually		