



**OREGON PHYSICAL THERAPY ASSOCIATION**  
**2005 STRATEGIC PLAN**  
*Updated 11-8-08*

<b>MISSION STATEMENT</b>	<b>VISION STATEMENT</b>
<p>The mission of the Oregon Physical Therapy Association (OPTA), a chapter of the American Physical Therapy Association (APTA), is to support, promote, and advocate for the profession of physical therapy. We strive to further the profession's role in the prevention, diagnosis, and treatment of conditions that affect movement and function.</p>	<p>By 2010, through statewide involvement of PTs and PTAs, the OPTA will advance the profession by:</p> <ul style="list-style-type: none"> <li>● Improving consumer awareness of the benefits of physical therapy</li> <li>● Facilitating autonomous, evidence based practice               <ul style="list-style-type: none"> <li>● Providing high quality education opportunities</li> <li>● Advocating for reimbursed and unlimited direct access</li> </ul> </li> <li>● Advocating for the recognition of PTs as the sole providers of physical therapy               <ul style="list-style-type: none"> <li>● Addressing the issue of referral for profit</li> </ul> </li> </ul>

**OREGON PHYSICAL THERAPY ASSOCIATION  
2005 STRATEGIC PLAN – Updated 11-8-08**

FINAL GOALS	OBJECTIVES	STRATEGIES
<p><b>Goal #1 Education--OPTA provides high quality continuing education that meets the requirements for Oregon PT/PTA licensure.</b></p>	<p><b>1. Provide evidence based education when applicable</b></p>	<p><b>1. Hold a minimum of one evidence based course per year 2. Find out from instructor if their course is evidence based</b></p>
	<p><b>2. Provide courses in major areas of practice</b></p>	<p><b>1. Make sure courses are on topics of interest to members 2. Offer courses that meet mandatory continuing education requirements</b></p>
	<p><b>3. Courses will be fiscally responsible</b></p>	<p><b>1. Course must break even or make a surplus</b></p>
	<p><b>4. Provide accessible continuing education</b></p>	<p><b>1. Expand course locations outside of Portland metropolitan area and/or use other forms of distance learning</b></p>
	<p><b>5. Investigate the methodology of CE approval.</b></p>	<p><b>1. OPTA members will serve on the licensing board administrative rule task force</b></p>
	<p><b>6. Investigate record keeping for CE credits</b></p>	<p><b>1. Check with other APTA components that do this 2. Investigate financial impact on implementing program 3. Establish a work group to make a recommendation to the board on feasibility</b></p>

Action Plan for: Education Goal #1 Update 9-15-07	Prepared by: Dode Jackson & Sandra Fisher				
Objective # Strategy #	What?	Who?	When?	Cost <i>(both monetary and resources)</i>	Comments
1. Provide Evidence Based Education when applicable	<p>A. Hold a minimum of 1 evidence based course per year.</p> <p>B. Clarify with instructor if their course is evidence based.</p> <p>C. Promote as evidence based in the promotional brochure.</p>	<p>A. Committee will plan &amp; review yearly.</p> <p>B&amp; C. Speaker contact person will add this item to speaker contact checklist and confirm same with OPTA office for brochure text.</p>	<p>A. Quarterly committee meeting review/update.</p>	<p>Usual course budget, no additional cost.</p>	<p>On-going item.</p>
2. Provide courses in major areas of practice	<p>A. Evaluate that courses are on topics of interest to members. Obtain data from post course evaluations.</p> <p>B. Offer courses that are approved for mandatory cme.</p> <p>C. Evaluate section membership data to determine interest areas</p> <p>D. Do internet survey to licensees with email</p>	<p>A. Committee will review the evaluation forms.</p> <p>B. Committee will review topics to determine approval for CME.</p> <p>C&amp; D. Committee review/discuss</p>	<p>A. Review at committee meetings, or via email s/p evaluations mailed to all committee members.</p> <p>A. Plan evening courses specifically to test member interest in major clinical areas.</p>	<p>A. Usual course budget.</p> <p>D. \$200 for Licensing Board mailing list purchase and survey access.</p>	<p>On-going item.</p>

	addresses to determine areas of interest.		<p>B. Ongoing yearly basis.</p> <p>C. Review at January 2006 committee meeting.</p> <p>D. May/June with reference to internet survey in the membership LOG edition</p>		
3. Courses will be fiscally responsible	<p>A. Course will make a surplus and be competitive.</p> <p>B. Research and compare competitor registration fees.</p>	<p>A. OPTA office will do proposed budget per course.</p> <p>B. Sub-committee will review registration costs for competitive courses.</p>	<p>A. Determine course cancellation date and criteria.</p> <p>B. September 2006, evaluate competitive rates.</p> <p>A. Nov/Dec 2006. Evaluate attendance growth to determine impact of mandatory CME.</p>	No cost.	On-going.
4. Provide accessible continuing education	<p>A. Expand course locations outside PDX.</p> <p>B. Evaluate current use of distance learning materials owned by OPTA.</p> <p>C. Expand number of evening courses.</p>	<p>A. Select city outside PDX</p> <p>B. OPTA office evaluate sales of Medical screening DVDs.</p>	<p>A. Plan one course/year outside PDX.</p> <p>B. Nov/Dec 2006 committee review sales status.</p>	<p>A &amp; C. Usual course budget.</p> <p>B. No cost.</p>	<p>A. Completed. Annual conference in Eugene.</p> <p>B. On-going.</p>

		C. Offer 4 evening courses 2006			
5. Investigate the Licensing Board methodology of CE approval	A. OPTA member will serve on Licensing Board Admin rule task force.	A. Dode Jackson.	A. Sept 2005- Dec 2005.	No cost.	A. Completed- Licensee shall take course that pertains to area of practice. Licensing Board will perform random audits of licensee CME. Will approve courses approved by other states and/or APTA and will evaluate courses on a case/case basis.
6. Investigate record keeping for CE credits	A. Establish a work Group to study feasibility and make a recommend to Board. B. Check with other APTA components that already provide this service. C. Invest financial impact on implementing a program.	A. Sub group of the CE committee.	A. Establish work group in January 2007.  B. Check with Other APTA components by May 2007.  C. Determine financial impact by July 2007.		Completed—committee decided to not pursue at this time.

OPTA Updated Action Plan for: Goal #1 Education As of 2-29-08		Prepared by: CE Committee & Sandra Fisher			
Objective #  Strategy #	What?	Who?	When?	Cost <i>(both monetary and resources)</i>	Comments
<p>Objective #4 – Accessible CE</p> <p>Strategy: A subcommittee will be formed to explore alternative forms of CE (ie: webinars, podcasts, home-study via CD, conference call, etc.) to determine feasibility and utilization.</p> <p>Currently doing a test pilot program with an audio conference seminar in January and February to see what attendance will be like.</p>	<p>Subcommittee formed.</p> <p>Research on alternative forms of CE</p> <p>Audio workshop test program through Colorado PT assn.</p>	<p>Task force of CE committee: Sandra Fisher, Jim Arnoux, Sandra Gallagher, and Trevor Todd</p> <p>Offered to OPTA mbrs</p>	<p>By June 2008</p> <p>January, February and March of 2008</p>	<p>Volunteer and staff time</p> <p>Cost to run program through Colorado PT which will be charged back in reg fees</p>	
<p>Objective #2 – Provide courses in major areas of practice</p> <p>Strategy: Conduct a membership survey to ascertain what types of CE is wanted and needed by the membership</p>	<p>Conduct survey with CE specific questions</p>	<p>Task force of CE committee: Jen Wood, Christen Davidson-Juhnke and will be led by Sandra Fisher</p>	<p>By April 2008</p>	<p>Volunteer and staff time</p>	<p>This will be the 2<sup>nd</sup> CE survey conducted to ascertain membership needs for CE.</p>

<p>Objective #3 – Courses will be fiscally responsible</p> <p>Strategy: Doc Talks</p>	<p>The committee will focus on more broad appeal topics rather than specific, narrowly defined topics to attract a larger audience.</p>	<p>CE Committee</p>	<p>On-going</p>	<p>Volunteer time</p>	
<p>New Objective #7 – Enhanced promotional effort</p>	<p>The committee agreed to work on more publicity in the <i>Log</i>, and website. They agreed to have the committee member responsible for the program write a promotional piece to entice members to register for this workshop. The committee recommended doing a monthly email highlighting upcoming events and linking back to the OPTA website.</p>	<p>CE Committee</p>	<p>On-going</p>	<p>Volunteer time</p>	

**OREGON PHYSICAL THERAPY ASSOCIATION  
2005 STRATEGIC PLAN – Updated 11-8-08**

<b>Goal #2 Legislative—OPTA will address the issue of referral for profit.</b>	<b>1 The board of directors will appoint a task force on referral for profit by mid 2006</b>	<b>1. Appoint task force.</b>
	<b>2. The board to charge the task force with assignments</b>	<b>1. Survey members regarding on attitudes regarding POPTS</b>
		<b>2. Gather data on incidence of POPTS in Oregon in 2006</b>
		<b>3. Review APTA POPTS resource materials</b>
		<b>4. Report findings to OPTA legislative committee and board by 2007</b>
	<b>3. Educate membership and address issue by 2008</b>	<b>1. Publish report to the membership on task force's work</b>
		<b>2. Possibly take legislative action for the 2009 legislative session</b>

Action Plan for: Referral for Profit Goal #2 Update 9-17-07	Prepared by: Karen Walz & Randy Grossman				
Objective # Strategy #	What?	Who?	When?	Cost <i>(both monetary and resources)</i>	Comments
#1 Appoint Task Force	Background familiarization APTA POPTS info	R/K	11/05		Completed
	Determine Task force size/composure	R/K	11/05		Completed
	Standardize task force roles and research/recruit members	R/K	11/05		Completed
	Finalize task force recommendations to OPTA BoD	R/K	12/15/05		Completed
	OPTA BoD appt task force	BoD	1/17/06		Completed

	Develop OPTA mechanism to recognize volunteer Task Force service and for replacement of resigning members	R/K	12/15/05		
#2 Task Force Assignments	Review/comment on APTA POPTS, other referral for profit resource materials	Task force	7/2006 interim report		Completed
	Survey membership on impact/issues surrounding referral for profit	Task force	7/2006 interim report		Completed
	Gather data on POPTS/referral for profit in OR, other components	Task force	7/2006 interim report		Completed
	Final report to on interim findings to OPTA Leg committee/BoD	Task Force	2007		Completed
	Other assignments per OPTA/EC BoD approval	Task Force			

#3 Educate Members on issue	Report to membership on task force findings	Task Force	2006-07		Completed
	Prepare for possible legislative action re: referral for profit language in OR PT Practice Act	Task Force; Leg committee; OPTA BoD	2008-2009		
#4 Use APTA PowerPoint Slides	Use the slides for student activities and other activities				

**OREGON PHYSICAL THERAPY ASSOCIATION  
2005 STRATEGIC PLAN – Updated 11-8-08**

<b>Goal #3 Legislative—OPTA will have a statute that includes unlimited direct access and protection of the term physical therapy</b>	<b>1. Introduce bills in the 2007 and/or 2009 legislative session(s)</b>	<b>1. Lobby all key legislative members during the session 2. Testify at hearings (at least 3-5 OPTA members)</b>
	<b>2. Develop compromise positions</b>	<b>1. Survey key stake holders</b>
	<b>3. Develop long term working relationships with key legislators</b>	<b>1. Develop statewide legislative liaisons with representatives with key legislators covered; plan district visits during interim</b>
	<b>4. Increase PAC money raised with goal of \$5,000 in account per year</b>	<b>1. Hold one fundraiser per year 2. Develop ads for Log and website</b>
	<b>5. Educate PTs/PTAs on key bill components, stake holders, key legislators</b>	<b>1. Write Log articles 2. Hold legislative day during session 3. Hold town hall during conference 4. Have legislators visit PT settings 5. Lobbyist intervention</b>
	<b>6. Identify specific professionals that we want to target</b>	<b>1. Identify avenues for facilitating collaboration/networking</b>
	<b>7. Expand PT's understanding of other health care professions and vice versa</b>	<b>1. Have PT's present our profession to other professions education 2. Present at other health care business meetings 3. Panels of health care professionals all speaking to one issue 4. Joint CE with other providers 5. Create networking events to encourage mentoring 6. Create a list of people willing to mentor in certain areas.</b>



## STRATEGIC PLAN - UPDATE

***Updated Action Plan as of November 8, 2008***

### ***Goal #3 - Legislative***

***Chiro Initiative*** – Heather Goodell reported on the Chiro group's work.

#### **Chiro Initiative Goal for 2009 – Educate Key Players Statewide about What PT's Are Qualified to Do**

- 1) Visit schools for MD, ND, DO, PA, DC etc. to educate about what PT's do
- 2) The legislative committee will develop talking points for the board and members to use to talk to legislators
- 3) Continue government affairs work with PAC fundraising goal of \$50,000 and meeting with legislators

Items to be looked at for the future: develop voter and key player education kit; and define a 2010 public relations attack if enough signatures are gathered after July 2010.

Heather Goodell moved to approve the goal and objectives presented above. Andrea Hughbanks seconded the motion, and it was unanimously approved.

Action Plan for Goal #3 - Updated 9-15-07

**Goal: By 2010 Physical Therapists in Oregon will have a statute that includes unlimited direct access and protection of the term Physical Therapy**

<u>Objective</u>	<u>Strategy</u>	<u>Who</u>	<u>When</u>
1. Introduce Bills in the 2007 and/or 2009 legislative session(s)	Lobby key legislative members during the session	Ricci, Genoa, LC	Sept '06
	Testify at hearings ( at least 3-5 OPTA members)		Sept '08
	Request sponsors for bill		On-going
2. Develop compromise positions	Survey key stakeholders	Ricci, Genoa, LC	Jun-Aug '06 Jun-Aug '08 On-going
3. Develop long term working relationships with at least 1-2 key legislators	Develop statewide liaisons with key legislators; plan visits during the interim	Ricci, Genoa, LC	March '06 On-going
4. Increase PAC money raised with a goal of \$30,000 in account by 2009	Hold one fundraiser per year	Stacey, Ann, Genoa	Spring Conf
	Develop ad's for the Log and Website		ongoing
5. Educate PT's and PTA's on key bill components, stake holders, and key legislators	Write Log articles	LC, Genoa	ongoing
	Hold Legislative day during session	LC, Genoa, PR committee	Mar '07,'09
	Hold Town Hall during conferences/Statewide	Karen W - Bend; LC; Liaisons	Spring Conf/ongoing
	Have Legislators visit PT settings	Liaisons	ongoing
	Lobbyist intervention	Genoa	ongoing
6. Address proposed chiropractic ballot measure initiative and PT's ability to perform spinal manipulation in Oregon			

<b>Goal #4 PR—OPTA will promote the role of physical therapy in health care and wellness to improve consumer awareness</b>	<b>1. Teach OPTA members how to access media</b>	<b>1. Use APTA resources to develop info/resource packet</b> <b>2. Train on how to contact media</b> <b>3. Offer a seminar on free/low cost PR opportunities and marketing techniques</b>
	<b>2. Increase the consumers exposure to information about the role of physical therapy in health care and wellness</b>	<b>1. Send out four press releases in two years on obesity, direct access, wellness and specific diagnosis</b> <b>2. Create a link on our website for consumer stories/testimonials that can be sent to local newspapers</b> <b>3. Create a link on our website for APTA's Find a PT</b> <b>4. Have a computer set up at a conference to allow members to sign themselves up on APTA's Find a PT</b> <b>5. Identify community based conferences to teach at by 2006</b> <b>6. Offer one community based education course per year that would tie into pre-existing community conferences by 2007</b> <b>7. Attend job fairs at high schools—3 per year</b> <b>8. Have an OPTA sponsored activity that coordinates with PT month</b>
	<b>3. Ongoing mentoring for replacement committee chair, vice chair and sub chairs as needed.</b>	<b>1. Have committee chair appointed by the end of each year.</b>

	<p><b>4. Promote the enhancement of collaborative relationships with health care professionals</b></p>	<p><b>1. Identify avenues for facilitating collaboration/networking</b></p> <ol style="list-style-type: none"> <li><b>1. Have PT's present our profession to other professions education</b></li> <li><b>2. Present at other health care business meetings</b></li> <li><b>3. Panels of health care professionals all speaking to one issue</b></li> <li><b>4. Joint CE with other providers</b></li> <li><b>5. Create networking events to encourage mentoring</b></li> <li><b>6. Create a list of people willing to mentor in certain areas.</b></li> </ol>
	<p><b>5. Identify specific professionals that we want to target</b></p> <p><b>6. Expand PT's understanding of other health care professions and vice versa</b></p>	<p><b>1. Identify avenues for facilitating collaboration/networking</b></p> <ol style="list-style-type: none"> <li><b>1. Have PT's present our profession to other professions education</b></li> <li><b>2. Present at other health care business meetings</b></li> <li><b>3. Panels of health care professionals all speaking to one issue</b></li> <li><b>4. Joint CE with other providers</b></li> <li><b>5. Create networking events to encourage mentoring</b></li> <li><b>6. Create a list of people willing to mentor in certain areas.</b></li> </ol>



## STRATEGIC PLAN - UPDATE

***Updated Action Plan as of November 8, 2008***

### ***Goal #4 – PR***

***Public Relations*** – Ricci Susick reviewed the goals for the PR plan to the group.

**PR Goal:** Pay for New PR Initiatives

- 1) Develop a “friends of PT” fund whose dollars will fund a PR effort to educate the public.
  - a. Establish a task force to get donors (see if Zach Jones will chair)
  - b. Solicit PT groups
  - c. Solicit public donors
  - d. PAC v. other issues
- 2) Apply for an APTA Grant for PR Efforts
- 3) Allocate funds in the 2009 budget for an advertising presence on the internet
- 4) Other PR Priorities
  - a. Encourage members to send letters to the editor
  - b. Have PR committee develop and promote PR kits for members to use

### **PR Plan**

- Begin grass roots effort with remainder of 2008 budget
- Develop internet presence with 2009 budget
- Other things can be accomplished if funding is available and raised from items 1 and 2 above.

Heather Goodell moved to approve adopting the PR goals as presented. Andrea Hughbanks seconded the motion, and it was unanimously approved.

<b>Action Plan for: PR Committee 3-6-08</b>	<b>Prepared by: Heather Goodell, PT, committee chair</b>				
<b>Objective # Strategy #</b>	<b>What?</b>	<b>Who?</b>	<b>When?</b>	<b>Cost? (both monetary and resources)</b>	<b>Comments</b>
OBJECTIVE 1: Teach OPTA members how to access media					
Strategy 1: Use APTA resources to develop info/resource packet					
	Email speakers Bureau members about how to write a press release	Susan to notify Sandra	Feb-08		decided not to re-print in log due to expense of extra pages
Strategy 2: Train members on how to contact the media	Annually update media contact list on the website	Susan to check with Dana/Sandra	Feb-March 08	\$0	Susan will see if Update Management is able to do this
	Address outlying areas by getting contacts in other towns	Susan work with regional liasons	Dec-08	\$0	
	Annually update the speakers burea (PTs willing to speak to the media or at conferences)	Susan	March 2008 Spring Conference		Have a sign up list at the conference/update current list and speak at the business meeting to recruit; Email the burea to be be sure all contact info is correct

	Offer our Portland Monthly ad to members at a cost	Andrea	Feb-08		Proposed cost to be \$100 for OPTA members to purchase the rights to our magazine ad, Andrea to check on APTA ad prices and be sure we are comparable prior to emailing members with opportunity to purchase. Depending on response of members consider selling our ad to members in other states.
	Research Advertising venues that would offer a discount to OPTA members who advertise and alert members to these opportunities	Andrea	Dec-08		Andrea to research Movie screens prior to start of movies and other venues as able
	Educate our members on what we have done for PR already (mentoring and inspiring them) via log article and article in PT magazine	Heather	Jan-08		DONE Wrote article in log thanking members for contributions to last year's PR efforts
	Offer evening course	Dode	2008		Scheduled for Medford 2008 "How to Promote our Profession"
	Have APTA PR committee come out and present on how to write a press release and other PR topics	Heather/Dode	2009		Heather has been in touch with APTA's Stephanie Block about this and they are considering Fall 2009 dates

OBJECTIVE 2: Increase consumers exposure to information about the role of physical therapy in health care and wellness					
Strategy 1: Send out 5 press releases in 1 yr on obesity, direct access, wellness and specific diagnoses	Repeatedly contacting various elements of the media about stories/press releases	Sandra/Dana	Dec-08	0	Susan to ask Update Management if they can submit the stories that she solicits from members and the speakers bureau as the media is more likely to respond to opta.org than our personal emails
	Solicit press releases from members and speaker's bureau 5 times/year	Susan Bamberger	Dec-08		Susan to email speaker's bureau
	<b>NEWSPAPERS</b>				
	Email Speakers bureau 5 times/year to solicit stories for OPTA to present to the media	Susan Bamberger	Dec-07	\$0	Andrea to submit women's health article to Susan/Sandra for distribution, Heather submitted a story on "virtual injuries" while playing the "wii" to the Oregonian and the Seattle Post, Ted to write story on Direct access, Susan to get stories that coincide with the log article themes
	<b>WEBSITE</b>				
	Update Website with Consumer info	Ruth	ongoing	0	Ruth to check on putting a link to APTA's consumer diagnosis search page
	<b>Magazines</b>				
	Place ad in Portland Monthly Magazine	Heather/Andrea	Jan-Dec 2009	5,200	
	Assess response to our ad by getting information on webhits for Oregon Zipcodes before/after	Ruth	08-Mar		Ruth to check with APTA webmaster for FindaPT link

	Research Sunset Magazine costs and issues	Megan Cox	08-Apr	5000 to use APTA grant money as able (Andrea to research this)	Actual cost for full page advert. In NW region (Oregon, Washington, Alaska, Idaho and BC) is ~\$30,000, 1/2 page costs 12,000
	Present research to neighboring chapters to include Idaho, WA, Alaska	Megan Cox	8-Apr		Megan has heard back from Washington who is interested and Idaho who would like to know why we aren't targeting a health related magazine and we have not heard from other regional states yet.
	Look into rural magazines	Susan to ask regional liasons	8-Dec	3,400	Bend's magazine is an idea? Susan to ask regional liasons about what media outlet they feel would be most effective for them with plans to devote most of PR budget to rural ad campain this year
	<b>Television</b>				
	Check on ability to purchase rights to WA television ad about direct access	Ted Ellquist	8-Feb		WA does not have a TV ad only a radio ad
	Obtain contacts in TV	Ted/Heather	Aug-08		Ted to followed up on contact with OPB who recommended OBP radio and we have no contact there; Heather to follow up with contact with KPTV and KATU
Strategy 6: Identify 2 Community based conferences to teach at annually growing the list					

	NW College of Naturopathic medicine	Carlee	May-08	35	Heather to email Carlee to see if she'll be willing to do this again this year - done once, will re-email
	Race for the Cure	need a new coordinator	Sep-07	\$550	try to get a new coordinator by July 2008 or consider not doing this activity this year if nobody steps up
Strategy 9: Have an OPTA sponsored activity that coordinates with PT month					to decide on this at next meeting April 1, 2008
OBJECTIVE 3: Ongoing mentoring for replacement committee chair, vice chair and subchairs as needed			ongoing		Discussed at meeting Jan 08
OBJECTIVE 4: Create a media watch and response subcommittee	Monitor the media for negative/incorrect messages about PT and respond with interviews, written response, etc	Ruth	8-Apr		Ruth to set up google alerts for the words Oregon and Physical Therapy and to let the committee know when action needs to be taken, and the committee with write response articles as needed
ADDITIONAL BUSINESS					
	Fill out APTA components award	Andrea	8-Apr		

**OREGON PHYSICAL THERAPY ASSOCIATION  
2005 STRATEGIC PLAN – Updated 11-8-08**

<p><b>Goal #5 Participation—By 2008, OPTA will increase membership outside of the Portland metropolitan area by 10%</b></p>	<p><b>1. Educate members/nonmembers regarding the value of membership</b></p>	<p><b>1. Different cost between member and nonmembers for CE</b>  <b>2. To have Log articles about the value of membership</b>  <b>3. To have member profiles in the Log</b>  <b>4. Every board member to have one lunch per year to talk about membership at a facility</b></p>
	<p><b>2. To increase membership in rural areas.</b></p>	<p><b>1. Hold one meeting per year outside of the Portland area in a key location</b>  <b>2. Make meetings in rural area make financial sense</b></p>
		<p><b>3. Determine the best type of meeting for the area the meeting will be held</b>  <b>4. Communicate with other rural states to see what strategies they use to include members in rural areas</b>  <b>5. Hold one membership drive per year</b></p>
	<p><b>3. Re-establish chapter liaisons to the board</b></p>	<p><b>1. Assign one board member to mentor each chapter area designee and have them make contact on a regular basis</b>  <b>2. Have one meeting outside the Portland area</b></p>

	<b>4. Target increased student membership</b>	<b>1. One board meeting per year at either Pacific University or Mt. Hood Community College with students invited</b> <b>2. Assign an active member to each student member</b> <b>3. Create a membership competition between the classes and schools in Oregon with prizes</b> <b>4. Provide funding for APTA Student Conclave</b>
--	---	---

**OREGON PHYSICAL THERAPY ASSOCIATION  
2005 STRATEGIC PLAN – Updated 11-8-08**

<b>Goal #6 Participation—Increase volunteer membership involvement</b>	<b>1. Hold leadership training/event one time per year</b>	<b>1. Hold evening course on specific topics to train members ie: lobbying, reimbursement, etc.</b>
	<b>2. Establish vice chairs for all appropriate committees</b>	<b>1. Current chairs to find vice chairs</b>
	<b>3. Establish short term tasks and projects to get people involved</b>	<b>1. Have committees come up with task forces and charges</b>
	<b>4. Determine current membership involvement to establish a baseline</b>	
	<b>5. Increase volunteer membership involvement by 15%</b>	
	<b>6. Develop volunteer recognition and incentive plans</b>	

<b>OPTA Action Plan for: Membership 1-31-08</b>	<b>Prepared by: Jeff Cox</b>
---	------------------------------

<b>Objective # Strategy #</b>	<b>What?</b>	<b>Who?</b>	<b>When?</b>	<b>Cost (both monetary and resources)</b>	<b>Comments</b>
Objective: Increase Board to member outreach to improve committee strength	OPTA sponsored Social Event	Membership committee/Board	Yearly-first one will be spring 2008	\$750 dollars budgeted for first event, subsequent cost based off success of 1 <sup>st</sup> event	First event is currently being planned, will have info re: membership, PAC, etc at events
	Regional OPTA sponsored Social Event	Membership committee/chapter liaisons/Board	Yearly-starting in 2009 or 2010	Time to coordinate with liaisons, develop budget based off interest and success of Portland area event,	This is developmental, hope is to expand above event to reach out to members outside the Portland area
	Volunteer sign up at OPTA events	All committees/volunteers	At OPTA events	Volunteer hours to coordinate	Have volunteers sign up at OPTA events for upcoming needs. This way members can be involved and sign up for an event/time commitment that they are interested in.
	Current member membership dues assistance	Board, Membership Committee chair, (Possibly organize a subcommittee to be in charge of assessing funds)	Yearly	\$2100 from 2006 Membership drive designated for this program	Current members who have had active involvement will be able to apply for assistance for membership dues during time of financial hardship
Establish baseline measurement for involvement by getting list of committee and subcommittee members	Committee and subcommittee list	One board member to coordinate, involvement from all committee and subcommittee chairs	Quarterly	Time to report and by each chair and board member to coordinate into single list or maintain database	Each quarter, each chair will report to a designated board member a list of active members

Objective # Strategy #	What?	Who?	When?	Cost <i>(both monetary and resources)</i>	Comments
Strengthen relationships with academic institutions to encourage student attendance at conferences and events	Emerging Student Leader Program				
	Student PTA membership assistance program	Board/membership committee/Board to Mt. Hood Liaison	Yearly, during Mt. Hood PTA students 2 <sup>nd</sup> year	\$2400 from 2006 Membership Drive was designated for this program	Students who apply for assistance will be required to attend OPTA conference or business meeting or perform volunteer activity

Action Plan for: Membership/Participation Goal #5-6	Prepared by: Susan Bamberger				
Objective # 1 To educate members and nonmembers regarding value of membership Strategy #	What?	Who?	When?	Cost <i>(both monetary and resources)</i>	Comments
Objective 1, strategy 1: To educate different costs between members and nonmembers	1) Newsletters, emphasize cost differential of CE's 2)Email blurbs, discussing discounts	Newsletter, OPTA staff	1)With each newsletter, 2) 6 weeks and 1 month before a CE	Time: about 25 hours per year of staff work??. Price for publication of newsletters	On-going.
Objective 1, strategy 2: To have log Articles about the value of membership	1)Write one article per Log publication	Membership committee	With each log	Minimal	On-going.
Objective 1, strategy 3: To have Board members provide a lunch at a facility	Find 4-6 volunteers to arrange luncheons regarding the APTA	Board members, delegates	By 2008, 4-6 per year	About \$150 per lunch = \$900 per lunch	May not be enough money this year, but would be good to work towards this in 2007 and on
Objective 1, strategy 3: To have member profiles in the log	Write one article per log publication	Membership committee	With each log	Minimal	On-going.

Objective # 2: To increase membership in rural areas Strategy #	What?	Who?	When?	Cost <i>(both monetary and resources)</i>	Comments
Hold one meeting per year outside of the Portland metro area	Arrange a meeting in Bend	Susan	5/06	Travel expenses: \$50, breakfast food for meeting: \$200	Done.
Communicate with other rural states	1) Participate in online chats re: membership 2) Attend membership roundtable at CSM 2006	1)membership committee 2) Susan	1) ongoing 2) 2/06	\$300 to assist Susan with expenses in San diego	On-going.
Hold one membership drive per year	Spring conference: if nonmembers sign up for APTA, they et 50% off the class??	Education/membership (Dode/Susan/Joyce)	Maybe by 2006, or could plan for 2007	Will take \$ from CE, could membership defray costs??	On-going.
Reestablish Chapter liaisons	1) Contact current liaisons/establish new ones if needed 2)Assign Board members to chapter liaisons	1) Membership committee	1) by 6/06 2) By 9/06	Minimal	On-going.
Have one Board meeting per year outside the PDX are	Eugene conference- advertise board meeting	OPTA staff	ASAP	Email blurbs- time = ??	Done.

Objective : 3: Target increased student membership	What?	Who?	When?	Cost?	
Create additional funding for students	Fundraise at Spring conference for both MHCC and Pacific Students Goal is to offer assistance in dues	1) Student Liasons with scholarship committee??	For 2007 and on	Time to organize money for rental of facility/room	Done, and on-going.



Action Plan for: <b>RESEARCH</b> Goal #7	Prepared by: <b>EMILY LIGHTHIPE</b>				
Objective # Strategy #	What?	Who?	When?	Cost <i>(both monetary and resources)</i>	Comments
OBJECTIVE #1  STRATEGY 1 OF 1	Establish Research Committee and chairperson	David Golda And OPTA Board	March 1 <sup>st</sup> 2006	Email and phone time  Mailings	
OBJECTIVE #2  STRATEGY 1 OF 2	Advertise article for study group in LOG	Research Committee	First article to start May/June 2006 issue	Cost to print LOG	Committee to pick article and do LOG listing
OBJECTIVE #2  STRATEGY 2 OF 2	Provide OPTA website link for above article	Research Committee through Sandra and Rob	May 2006	Free? Except time for article to be posted on website	
OBJECTIVE #3  STRATEGY 1 OF 4	Establish series of courses for learning research basics	Research Committee task force with Con Ed Committee	Spring 2007 and Fall 2007		At least four people on task force  Use ideas from APTA's Section on Research
OBJECTIVE #3  STRATEGY 2 OF 4	Course with nationally recognized speaker on Research Analysis	Research Committee task force with Con Ed Committee	Winter 2008		At least 6 people on task force  Contact APTA for referrals

<b>Action Plan for: RESEARCH</b>		<b>Prepared by: EMILY LIGHTHIPE</b>			
<b>Objective # Strategy #</b>	<b>What?</b>	<b>Who?</b>	<b>When?</b>	<b>Cost</b> <i>(both monetary and resources)</i>	<b>Comments</b>
OBJECTIVE #3  STRATEGY 3 OF 4	Grant writing seminar	Research Committee task force	Fall 2008		
OBJECTIVE #3  STRATEGY 4 OF 4	LOG Article on grant writing	Research Committee person along with Member at Large #3	After above seminar (Fall 2008/early Winter 2008)	Cost to print LOG	Article could be a summary of the seminar
OBJECTIVE #4  STRATEGY 1 OF 3	LOG article on evidence based practice (EBP) and/or best practice models	Research Committee along with Cont Ed Committee	After below workshop (Winter/Spring 2009)	Cost to print LOG	Article could be a summary of the workshop on EBP
OBJECTIVE #4  STRATEGY 2 OF 3	Hold conference workshop on EBP and/or best practice models	Research Committee along with Cont Ed Committee	Winter 2009		
OBJECTIVE #4  STRATEGY 3 OF 3	Grant to promote EBP	Research Committee along with Cont Ed Committee	Winter 2010		

**OREGON PHYSICAL THERAPY ASSOCIATION  
2005 STRATEGIC PLAN – Updated 11-8-08**

<p><b>Goal #8 Professionalism—OPTA will promote professionalism and integrate it into practice</b></p> <p><b>Changes still coming from Carol Schunk to this entire section</b></p>	<ol style="list-style-type: none"> <li><b>1. Gather data regarding professionalism to help define the topic area</b></li>   <li><b>2. Educate and define professionalism for members</b></li>   <li><b>3. Create networking opportunities to promote mentoring of professionalism</b></li>   <li><b>4. Identify specific professionals that we want to target</b></li>   <li><b>5. Expand PT's understanding of other health care professions and vice versa</b></li> </ol>	<ol style="list-style-type: none"> <li><b>1. Research APTA resources</b></li> <li><b>2. Determine requirements for ethical course work</b></li> <li><b>3. Look at feasibility of on-line or DVD course</b></li>   <li><b>1. Provide course and panel discussion on professionalism (ie: core values and ethical decision making)</b></li>   <li><b>1. Study feasibility of an online resource to promote mentoring/networking</b></li>   <li><b>1. Identify avenues for facilitating collaboration/networking</b></li>   <li><b>1. Have PT's present our profession to other professions education</b></li> <li><b>2. Present at other health care business meetings</b></li> <li><b>3. Panels of health care professionals all speaking to one issue</b></li> <li><b>4. Joint CE with other providers</b></li> <li><b>5. Create networking events to encourage mentoring</b></li> <li><b>6. Create a list of people willing to mentor in certain areas.</b></li> </ol>
--	---	---

<b>Action Plan for: 2007 - 2008 Ethics Committee Goal #8</b>	<b>Prepared by: Carol Schunk 10-07</b>				
<b>Objective # Strategy #</b>	<b>What?</b>	<b>Who?</b>	<b>When?</b>	<b>Cost</b> <i>(both monetary and resources)</i>	<b>Comments</b>
<b>Objective</b> – Promote member awareness and knowledge of ethical issues and professionalism.	Exchange data with Oregon licensing board	Ethics Committee	Ongoing	None	1. Ongoing communication with the licensing board
	Provide educational opportunities on ethics to members.	Ethics Committee	Ongoing	None	1. Investigate alternative education moduals
	Investigate ethical cases in keeping with APTA procedures.	Ethics Committee	Ongoing	None	1. Communicate with APTA ethics committee.  2. Follow APTA procedures.
	Publish <i>Log</i> articles on ethical topics.	Ethics Committee	Ongoing	None	1. Topics on professionalism and ethics.
	Update OPTA bylaws.	Jon Seitz	Ongoing	None	Follow process as needed when making OPTA or APTA required changes to bylaws.

**OREGON PHYSICAL THERAPY ASSOCIATION  
2005 STRATEGIC PLAN – Updated 11-8-08**

<p><b>Goal #9 Professionalism—OPTA will promote the enhancement of collaborative relationships with health care professionals</b></p> <p><i>Covered &amp; incorporated under goals 3, 4, and 8.</i></p>	<ol style="list-style-type: none"> <li><b>1. Identify specific professionals that we want to target</b></li> <li><b>2. Expand PT's understanding of other health care professions and vice versa</b></li> </ol>	<ol style="list-style-type: none"> <li><b>1. Identify avenues for facilitating collaboration/networking</b></li> <li><b>1. Have PT's present our profession to other professions education</b></li> <li><b>2. Present at other health care business meetings</b></li> <li><b>3. Panels of health care professionals all speaking to one issue</b></li> <li><b>4. Joint CE with other providers</b></li> <li><b>5. Create networking events to encourage mentoring</b></li> <li><b>6. Create a list of people willing to mentor in certain areas.</b></li> </ol>
---	---	---



### Goal #10-11 – Reimbursement – Updated Action Plan 11-8-08

Strategic Initiative	Goals	Action Plans	Responsible Party	Due Date
<b>I. Develop Understanding of Membership’s Reimbursement needs and concerns</b>	1. Survey Membership for primary needs, concerns and educational wishes related to reimbursement for future planning	1A. Develop survey asking membership reimbursement questions	<ul style="list-style-type: none"> <li>• Bob Thomas</li> <li>• Reimbursement Committee</li> </ul>	1/15/09
		1B. Submit online survey to membership through Survey Monkey	<ul style="list-style-type: none"> <li>• Bob Thomas</li> <li>• Reimbursement Committee</li> </ul>	2/10/09
		1C. Tabulate responses and develop report	<ul style="list-style-type: none"> <li>• Bob Thomas</li> <li>• Reimbursement Committee</li> </ul>	3/1/09
		1D. Use report for reimbursement committee planning and present to OPTA board	<ul style="list-style-type: none"> <li>• Reimbursement Committee</li> </ul>	3/15/09
<b>II. Increase Reimbursement Education to OPTA Membership</b>	2. Provide 3 continuing education seminars to OPTA membership	2A. Present “Documentation for Reimbursement” webinar for OPTA	<ul style="list-style-type: none"> <li>• Bob Thomas</li> </ul>	2/28/09
		2B. Provide 2 additional reimbursement seminars on topics determined from member survey	<ul style="list-style-type: none"> <li>• Reimbursement Committee</li> </ul>	12/31/09
		2C. Coordinate educational efforts with Education Committee	<ul style="list-style-type: none"> <li>• Reimbursement Committee and Dode Jackson</li> </ul>	3/31/09
<b>III. Increase Reimbursement Information to OPTA Membership</b>	3. Write 3 Articles in the OPTA Log	3A. Submit article to be included in the December/January	<ul style="list-style-type: none"> <li>• Bob Thomas</li> </ul>	11/30/08

		OPTA Log on MACs and RACs		
		3B. Submit 2 additional reimbursement articles on topics determined from member survey	• Reimbursement Committee	12/31/09
<b>IV. Research opportunities for increased Payer Interface</b>	4. Establish 1 event/activity for Payer interface in 2009	4A. Research the necessity and efficacy of Payer Forum	• Reimbursement Committee	3/31/09
		4B. Research the use of a Reimbursement Specialist	• Bob Thomas	6/30/09
		4C. Research other state chapter's reimbursement initiatives and determine effective activities	• Reimbursement Committee	3/31/09
		4D. Research APTA recommendations for reimbursement committee activities	• Reimbursement Committee	3/31/09
		4E. Research Payer conferences that could be attend by OPTA	• Reimbursement Committee	3/31/09
		4F. Report Recommendations to OPTA Board for 2010	• Bob Thomas	6/30/09

Submitted By: OPTA Reimbursement Committee

Michael Billings

Todd Gifford

Tom Moline

Nick Rinard

Ann Stanley

Bob Thomas, Chairperson



## STRATEGIC PLAN - UPDATE

***Updated Action Plan as of November 8, 2008***

### ***Goal #10 & 11 – Reimbursement***

***Reimbursement*** – Chris Murphy reported that his work group adopted Bob Thomas' outline as presented with the exception of goal number IV, 4B that the board has already determined is not feasible at this time. From the old strategic plan goals eliminate goal #10, objective #2 which is probably not obtainable.

Heather Goodell moved to approve Bob Thomas' updated strategic plan goals as noted above and to change the labels on the form to match the rest of the strategic plan (change strategic initiative to goals; change goals to objectives). The motion was seconded and unanimously approved.

Action Plan for: Reimbursement Committee	Prepared by: Danielle Ewing				
Goal # 10 Objective # 1	What?	Who?	When?	Cost <i>(both monetary and resources)</i>	Comments
Strategy #1: <b>Hold insurers forum in 2006 and 2008</b>	Plan Insurer's Forum	Danielle Andrea	Begin planning in April, 2006 for October, 2006	Approx. \$3,000	
Strategy #2: <b>Determine the current percentage of insurers which reimburse for direct access physical therapy services and assess yearly</b>	Gather information by looking at insurance company policies, asking other PTs, and contacting companies	Danielle	Complete list by end of March, 2006	\$0 (Member time)	
Strategy #3: <b>Develop and provide in-service on direct access to five largest insurers not currently paying for direct access</b>	Have 5 in-services set up and completed	Danielle	By year-end 2006	Approx. \$1,000 (includes materials and lunches for people attending inservice)	
Strategy #4: <b>Establish expert PT contacts to answer insurers questions</b>	Assign one Reimbursement Committee member to be liaison with specific insurance company	Karen -WC	Have contacts established by end of March	\$0 (Member time)	
Strategy #5: <b>OPTA board representative to attend annual APTA Reimbursement Forum</b>	Determine who should attend in 2006	Danielle	Decide by October, 2006; attend in December, 2006	Approx. \$500 for hotels, food	

**OREGON PHYSICAL THERAPY ASSOCIATION  
2005 STRATEGIC PLAN – Updated 11-8-08**

<p><b>Goal #11 Reimbursement—To provide education and resources regarding reimbursement</b></p>	<ol style="list-style-type: none"> <li><b>1. Determine membership needs on reimbursement issues</b></li> <li><b>2. Educate PTs/PTAs on reimbursement</b></li> <li><b>3. Research billing companies and consider endorsement possibilities</b></li> </ol>	<ol style="list-style-type: none"> <li><b>1. Survey members by 2007</b></li> <li><b>1. Quarterly Log articles</b></li> <li><b>2. Evening CE/in-services twice yearly</b></li> <li><b>3. Establish expert contacts in specific areas of practice or reimbursement</b></li> <li><b>1. Survey members regarding use of billing companies and their satisfaction with those companies</b></li> <li><b>2. Develop tool to determine key features of each organization</b></li> </ol>
---	--	---

<b>Action Plan for: Reimbursement Committee</b>	<b>Prepared by: Danielle Ewing</b>				
<b>Goal # 11</b>	<b>What?</b>	<b>Who?</b>	<b>When?</b>	<b>Cost</b> <i>(both monetary and resources)</i>	<b>Comments</b>
<b>Objective # 1</b> Strategy #1: <b>Survey members by 2007</b>	Develop survey and distribute via e-mail?		Have survey completed by October 2006 to plan education in 2007	???	Asked members in 12/05 LOG article what Reimbursement issues they would like to learn about
<b>Obective #2</b> Strategy #2: <b>Quarterly Log articles</b>	Develop a schedule for who is responsible for which log article, and ideas for articles	Reimbursement Committee	Schedule completed by January, 2006		January –Danielle March –Diana Godwin? May -Andrea July -Laila September - November -
<b>Obective #2</b> Strategy #3: <b>Evening CE/in-services twice yearly</b>	Decide on two dates and two topics and for inservices	Danielle Ricci	Dates/topics chosen by end of February, 2006	\$500 (gas, hotel, materials, refreshments)	March –Eugene May??? –Ashland September??? -Bend

**OREGON PHYSICAL THERAPY ASSOCIATION  
2005 STRATEGIC PLAN – Updated 11-8-08**

<b>Goal #12 Practice Issues—Promote the use of the most effective and appropriate interventions in patient care</b>	<b>This goal was undecided and was incorporated under goal #7..</b>	



## **STRATEGIC PLAN - UPDATE**

***Updated Action Plan as of November 8, 2008***

***Goal #s 1, 5 & 8 – Fiscal Viability***

### ***Fiscal Viability***

#### **Goal #1 - Education - Reworked**

- 1) Expand sponsorship opportunities to CE events. Partnering with workforce shortage, OOPTSG, facility location donation
- 2) Investigate a webinar type of program offering for practice management, reimbursement type issues.

#### **Goal #5 - Membership – Increase OPTA membership by 10%**

- 1) At every OPTA event making some designated time to talk about the ethics and professionalism of being a member and member importance and what OPTA is doing
- 2) Funding a small amount of money for students to attend CSM. Have students do an in-service to the staff and promoting membership at it.

#### **Goal #8 – Professionalism in Practice**

- 1) Look at setting up a membership listserv
- 2) Career Center on website (fee based posting of resumes)—this item decided to not be beneficial