

2018 Annual Report



Our Vision

Transforming society by optimizing movement to improve the human experience

Our Mission

To build a community that advances the profession of physical therapy to improve the health of society through:

- ***Educating the people of California about the unique attributes, benefits, and value of physical therapy;***
- ***Meeting the physical therapy needs of the people of California through continuous development and improvement of physical therapist education, practice and research;***
- ***Supporting CPTA membership to strengthen professional identity, communication, leadership, networking, business development, and political outreach***

CPTA Board of Directors

Christopher Powers, PT, PhD, FAPTA
President

Valerie Teglia, PT, DPT
Vice President

David Powers, PT, DPT, MA, MBA
Finance Officer

Michael Simpson, PT, DPT
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Richard Katz, PT, DPT
Director

Kelley Kubota, PT, MS
Director

Thomas DeFranco, PT
Chief Delegate

Chukwuemeka Nwigwe, PT, DPT
Director

Alyssa Keeney-Roe, PT, DPT
Director



Message from the President

In 2018 CPTA continued to make strides in our ongoing journey to realize our vision to “Transform society by optimizing movement to improve the human experience”. As an organization we remain committed to our mission to “Build a community that advances the profession of physical therapy to improve the health of society.” Importantly, our strategic initiatives continue to move us forward in achieving our strategic goal: “Physical therapists are universally recognized and promoted as experts in human movement and function to whom consumers have unrestricted direct access.”

2018 was a year of fine-tuning our strategic initiatives and affirming our path forward. As an organization we continue to become more accountable and effective. Major accomplishments in 2018 included:

- Advancement of our ongoing public identity campaign.
- Successful defense of the practice of physical therapy against practice infringement.
- Pursuit of legislation and regulatory changes to advance the practice of physical therapy.
- Foundational work to pursue legislation related to insurance reform in the area of Workers’ Compensation in 2019.
- Promotion of the highest level of practice through our PT Centers of Excellence Program.
- Delivery of the highest level of education for our members.

With membership at an all-time high we remain fiscally strong thus allowing us the ability to pursue the essential activities that advance our mission. That being said, we are well positioned for growth and advancement of our strategic initiatives in 2019. Thank you for your continued support of CPTA as we move forward in improving the health of society.

A handwritten signature in black ink that reads "Chris Powers". The signature is written in a cursive, flowing style.

Christopher Powers, PT, PhD, FAPTA
CPTA President

Message from the Finance Officer



As of the end of 2018, CPTA remains in a strong financial position. The association continues to make solid financial decisions. Although CPTA ended 2018 with a net financial loss of \$105,103, the reserves remain fully funded at an optimal 29% reserve level and the association's assets stand at \$1,649,804. After purchasing the property for our headquarters several years ago, we continue to bring down the fifteen-year mortgage and as we see the value of real estate escalate in Sacramento, we continue to see the value of CPTA's property increase.

This past year CPTA did not reach a few of our income projections. Registration fees for Annual Conference were \$155,252 below the budget projection. Advertisement fees were \$23,626 below budget projection and chapter dues were \$14,585 below. At the end of the year, CPTA was \$190,606 below projected income. As a result, throughout year, the CPTA Board and Chapter office staff under the direction of Stacy DeFoe, Executive Director, and Jennifer Guico, Associate Executive of Finance, were able to hold down CPTA expenses by \$111,650 below budget projections to help offset the lower-than-anticipated income projections.

Under the direction of CPTA's Finance Committee and the support of Morgan Stanley, CPTA maintains a conservative investment portfolio. 2018 Finance Committee members are Dave Powers, Finance Officer, Dennis Langton, Rick Katz, Stuart Katzman, Mike Otahal, Roland Lucas and staff liaison, Jennifer Guico. The Finance Committee makes recommendations to the CPTA Board of Directors based an allocation formula that directs how we diversify our investments. There was a downturn in the financial market at the end of 2018. As a result, CPTA ended up with a \$30,702 loss in unrealized income for the year, which is included in the overall loss mentioned above.

CPTA maintains an efficient and productive organization. Throughout the year CPTA sponsored legislative activities in the state and nationally. The Education Committee set up an outstanding Annual Conference and offered 19 quality courses around the state. Public Relations worked throughout the year to keep our name and our message, "PTs Improve the Way You Move," in front of the public. Under the direction of Kelley Kubota, a newly-formed task force has also taken on a new challenge: to generate contributions and financial sponsors for a 2021 Rose Parade float celebrating APTA's 100th Anniversary, which will help our message gain worldwide attention.

CPTA continues to be a strong and dynamic Chapter. Under the direction and leadership of the Assembly, Board of Directors, and Chapter staff, CPTA continues to make great gains in supporting our membership while moving our association forward and remaining financially responsible.

A handwritten signature in black ink that reads "Dave Powers". The signature is written in a cursive, flowing style.

Dave Powers, PT, DPT, MA, MBA
Finance Officer

Legislation and Advocacy

More than **100** PTs, PTAs, and students attended PT Legislative Day.



AB 2423 (Direct Access to PT Services for Children with IEPs) was passed

CPTA reviewed more than **100** bills related to physical therapy.



Make your voices
HEARD

CPTA held **nine** meetings with interest groups about key legislation.



More than **250** students attended Student Legislative Day.



CPTA held **92** Capitol meetings and **106** district meetings.

Public Identity



Eight billboard advertisements ran for four weeks in Chico. The billboards had **1,092,816** impressions.

Bus advertisements ran in Santa Barbara/Ventura, Santa Cruz, and Sacramento.



Advertisements ran on Facebook for four months

with **450,772** impressions and a click-through rate of **.82%**.



Radio ads were aired in Riverside/San Bernardino. The two-month campaign generated **175,600** impressions.

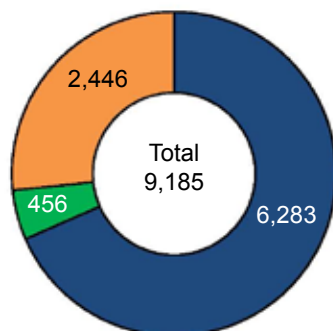
Advertisements for three months on Eventful.com had **151,025** impressions, an average open rate of **10.34%** and an average click-through rate of **.18%**.



Membership

2018 Membership as of 12/31/18

- PTs
- PTAs
- Students



CPTA held Town Hall meetings in Long Beach/South Bay, Redwood Empire and San Jose districts.



Payment



Presented in a multidisciplinary roundtable on PT payment, which included OTAC and California Speech and Language Pathology Association

Four webinars on Medicare were offered.



Payment Policy Committee members gave coding and contracting presentations to **seven** physical therapy education programs.



Bill language was created to propose legislative changes that will impact payment for physical therapist services.

Articles were written for the membership on Medicare updates, coding changes, mis-valued codes and the Merit-Based Incentive Payment System (MIPS).



Monitored and provided input to APTA and other stakeholders on payment policies.



Communicated with payers and state agencies regarding our opposition to Third-Party Administrators (TPAs) in order to eliminate TPA loopholes.

Established high-level contacts with the Department of Managed Health Care (DMHC), California Department of Insurance (CDI), Senate and Assembly Health Committee staff, and Department of Health Care Services Local Education Agency (DHCS LEA).

Quality Practice



Five Center of PT Practice Excellence Resource Manuals were sold.

The Ethics and Professionalism Council offered an Ethics Forum during Annual Conference and a lecture at District/SIG meetings and PT/PTA programs.

A presentation was developed to promote the Center of PT Practice Excellence Program.

Presentations on the Center of PT Practice Excellence Program were given to **five** Districts.



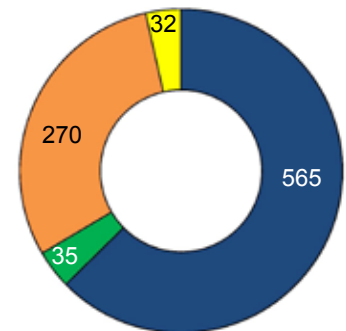
Education



Annual Conference was held in Santa Clara with more than **900** registrants and more than **20** educational sessions.

2018 Conference Participants

■ PTs ■ PTAs ■ Students ■ Guest



Nine face-to-face courses were held throughout the year.

Student Conclave was held at Mount St. Mary's University with more than **200** attendees.



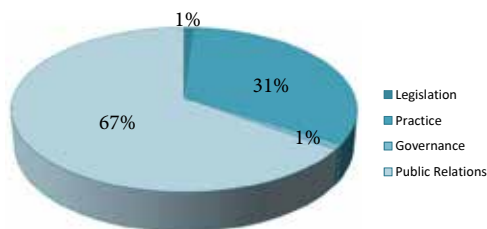
 CPTA hosted **six** Credentialed Clinical Instructor Program courses.

Financials

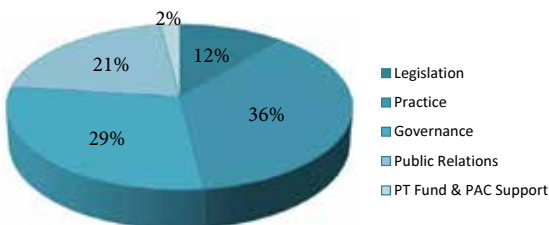
2018 PROGRAM INCOME

Legislation	1%
PT Legislative Day	2,700.00
Student Legislative Day	1,900.00
Total	4,600.00
Practice	31%
CPTA Annual Conference & Inst Courses	218,824.10
CPTA Exhibits	114,090.00
CPTA CAC Printed Program	3,800.00
Continuing Education Courses	212,062.50
Center of PT Excellence	575.55
Professional Affairs Consulting Service	750.00
Continuing Education Application Approvals	88,615.00
Total	638,717.15
Governance	1%
Interest Income	21,264.95
Services (labels)	3,709.14
Miscellaneous	90.20
Total	25,064.29
Public Relations	67%
Membership Dues	1,239,318.37
Website/Newsletter & PT Notes Advertising	56,926.26
Business Partners of Physical Therapy	14,400.00
Shared Services	17,131.97
Miscellaneous	11,019.75
Total	1,338,796.35
Total Program Income	2,007,177.79
2018 Unrealized Loss on Investments	(30,702.66)
Total 2018 Income	1,976,475.13

INCOME



EXPENSES



Data based on unaudited financials

2018 PROGRAM EXPENDITURES

Legislation	12%
Government Relations	22,518.30
Lobbying	96,394.13
PT Legislative Day	8,584.20
Student Legislative Day	10,446.21
Committees: Government Affairs, CAL-PT-PAC	9,262.29
General & Administrative Expenses	107,620.49
Total	254,825.62
Practice	36%
CPTA Annual Conference & Inst Courses	282,115.66
CPTA Exhibits	38,722.32
Continuing Education Courses	110,877.88
Continuing Education Program Approvals	3,005.87
Practice Expenses	1,883.95
CPTA CAC Printed Program	4,139.28
Center of PT Excellence	900.08
Professional Affairs Consulting Service	158.57
Committees: Ethics, Payment Policy, Quality Practice, Awards, Education, RFP Task Force	15,781.71
General & Administrative Expenses	284,733.67
Total	742,318.99
Governance	29%
Assembly of Representatives	35,056.82
House of Delegates	76,900.09
Chapter Board	35,906.50
District/SIGs	43,430.82
Services (labels)	309.16
Committees: Finance, Tellers, Nominating, Reference, Orientation, APTA Student Conclave	29,650.67
General & Administrative Expenses	385,104.55
Total	606,358.61
Public Relations	21%
Website & Newsletter	41,616.12
Membership Development & Retention	8,457.67
Public Outreach	179,026.53
Business Partners of Physical Therapy	448.82
Rose Bowl Float	1,752.93
Committees: Communications	3,330.49
General & Administrative Expenses	206,619.24
Total	441,251.80
PT FUND & PAC Support	36,822.93
Total 2018 Expenditures	2,081,577.95