

2015 in Review *Christopher Powers, PT, PhD, CPTA President*



2015 was a very productive year for CPTA. Our organization continues to be fiscally sound and our membership continues to grow. In fact, membership surpassed 8,000 members for the first time in CPTA history. Importantly, we have laid a strong foundation to move forward

in the years to come to accomplish our strategic goals and initiatives.

With respect to our efforts related to public identity, CPTA continued to work diligently to educate consumers of the benefits of direct access to physical therapist services. Specifically, 2015 marked the roll-out of our new branding campaign “Physical Therapists Improve the Way You Move.” 2015 also marked a significant change in the allocation of chapter resources to promote our brand through a statewide radio and print ad campaign. CPTA is committed to sending a strong message to consumers about why they should see us first!

CPTA also was extremely busy in the area of payment policy. The Payment Policy Committee was active in voicing member concerns and providing direct input regarding numerous payment challenges such as the Cigna/ASH utilization management process and the Division of Workers’ Compensation proposed regulations for the Home Health Fee Schedule and Medical Treatment Schedule for chronic conditions. In addition, CPTA spearheaded a grassroots campaign to block OrthoNet’s utilization management program with Anthem Blue Cross. 2015 also marked the formation of a Payment Issues Coalition

involving other health care associations and societies with the goal to develop a strong advocate group to fight payer fraud and abuse.

Another major area of focus in 2015 was the restructuring of district operations. The feedback received by the Governance Review Task Force in 2014 resulted in several important district operation changes approved at the 2015 Assembly of representatives: 1) the rescinding of district bylaws and the adoption one set of rules of order for district activities; 2) the closing of district bank accounts and move to one centralized accounting system at CPTA, and 3) combining the positions of district secretary and treasurer to reduce the number of positions that need to be filled. The Chapter Board will continue to consider more global re-structuring options in 2016 to ensure that the needs of the membership are being met in the most efficient way possible.

Although CPTA did not sponsor legislation in 2015, the Government Affairs Committee was active in monitoring more than 100 bills that had the potential to affect physical therapist practice. CPTA evaluated and modified its legislative plan to work toward the achievement of CPTA’s strategic goal. Our work on the passage of Consumer Direct Access has given us the opportunity to perfect our grassroots network, develop strong key relationships and educate legislators about the distinctive role physical therapists play in health care.

These are just a few of CPTA’s accomplishments in 2015. CPTA leadership and staff are committed to continuing work in these important areas in 2016. Importantly, CPTA will remain vigilant and ready to defend against threats to our profession and practice.

Financial Overview *Dennis Langton, PT, CPTA Finance Officer*



2015 was a very active year for CPTA. It was a bit more of a challenge from a financial standpoint compared to last year. Our income for 2015 was almost 1% less than 2014 but about 6% below what was budgeted. The largest variance was related to dues. Even though our

membership in 2015 increased the dues collection was nearly identical to 2014. The largest reason for that rests in the Career Starter Dues Pilot Program initiated by APTA of which CPTA is a participant. While this yields an overall reduction in chapter dues in its initial phase, our hope is that in the long term it will show an increase in dues income along with the increased membership. Application fees and interest/dividends were the other areas which performed under the anticipated budget. We managed our expenses very well in 2015. Overall we spent more than \$11,000 less than we budgeted while at the same time not reducing any programs, services or activities. Keeping CPTA’s strategic goal and its areas of focus in mind, the three largest areas of our expenditures were allocated to public relations, practice and payment advocacy.

The finance Committee has the responsibility to oversee and make recommendations to the Board of Directors in

regards to our investment portfolio. CPTA adheres to a Board approved asset allocation formula which diversifies our portfolio between stocks, bonds, real estate and cash. We examine the performance of each of our investment programs and make changes when we feel that there is underperformance in the market or there is a particular area of growth opportunity. Our mix of investments is designed to allow for a substantial upside when the market performs well while at the same time providing protection to minimize our downside during market decline. For the most part, 2015 was rather flat with some large market swings appearing in the fourth quarter. CPTA, with good financial management, was still able to post a \$10,000 unrealized gain. Overall, while there was a net loss for the year, CPTA ended 2015 at an optimal reserve level.

The finance committee and Board of Directors are supported in their fiduciary responsibilities by a very financially responsible staff led by Executive Director, Stacy DeFoe and Executive Associate of Finance, Jennifer Guico. CPTA’s 2016 Finance Committee is composed of Finance Officer, David Powers, Dennis Langton, Rick Katz, Mike Otahal, Stuart Katzman and Roland Lucas. I would like to thank my fellow committee members along with CPTA staff for their time and outstanding efforts on behalf of the members of CPTA.

CAL-PT-PAC raised \$7,500 at our Annual Conference and received donations from 987 donors

A total of 416 radio advertisements aired in Fresno, Los Angeles, San Diego, San Francisco and Santa Rosa

Advertising on WebMD resulted in 1,217,899 impressions and 939 clicks to the MoveCalifornia website

Presented Annual Conference in Pasadena with more than 1,200 registrants

Held PT Legislative Day in Sacramento with 135 registrants and Student Legislative Day with 225 students

Ninety bus advertisements ran in Long Beach, Oakland/Alameda and San Bernardino

Social media ads were purchased on Google and Facebook resulting in 2,917,337 impressions and 14,117 clicks to the MoveCalifornia website

CPTA shared its opposition to the Anthem/OrthoNet partnership with the Department of Managed Health Care while also leading a powerful patient advocacy campaign

ACCOMPLISHMENTS

2015 PROGRAM INCOME

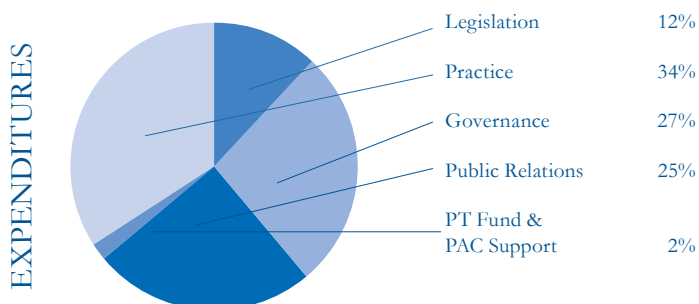
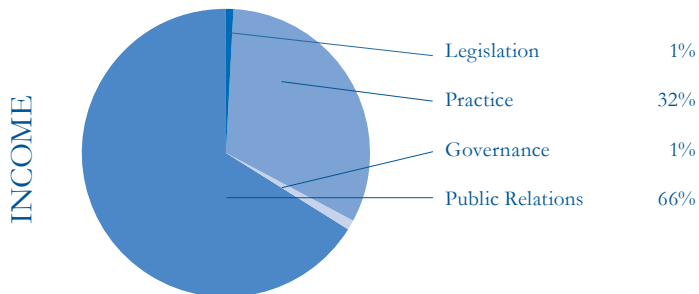
Legislation	1 %
PT Legislative Day	3,400.00
Student Legislative Day	1,250.00
Total	4,650.00

Practice	32 %
CPTA Annual Conference & Inst Courses	226,484.90
CPTA Exhibits	94,090.00
CPTA CAC Printed Program	9,510.00
Continuing Education Courses	206,792.00
Centers of Excellence Recognition Program	1,573.81
Professional Affairs Consulting Service	1,100.00
Continuing Education Application Approvals	66,957.50
Total	606,508.21

Governance	1 %
Interest Income	18,826.46
Services (labels)	6,170.29
Miscellaneous	200.00
Total	25,196.75

Public Relations	66 %
Membership Dues	1,107,815.07
Website & Newsletter and PT Notes Advertising	91,967.07
Business Partners of Physical Therapy	18,400.00
Shared Services	10,347.26
Miscellaneous	3,013.13
Total	1,231,542.53

Total Program Income	1,867,897.49
2015 Unrealized Gain on Investments	10,000.64
Total 2015 Income	\$1,877,898.13



2015 PROGRAM EXPENDITURES

Legislation	12 %
Government Relations	26,802.09
Lobbying	109,001.44
PT Legislative Day	12,939.08
Student Legislative Day	6,182.63
Committees: Government Affairs, CAL-PT-PAC	6,169.99
General & Administrative Expenses	80,189.51
Total	241,284.74

Practice	34 %
CPTA Annual Conference & Inst Courses	219,494.79
CPTA Exhibits	38,606.83
Continuing Education Courses	111,546.07
Continuing Education Program Approvals	1,998.18
Practice Expenses	6,055.03
Centers of Excellence Recognition Program	807.81
CPTA CAC Printed Program	5,823.20
Professional Affairs Consulting Service	527.95
Committees: Ethics, Payment Policy, Quality Practice, Awards, Education, RFP Task Force	20,863.83
General & Administrative Expenses	277,699.30
Total	683,422.99

Governance	27 %
Assembly of Representatives	17,881.74
House of Delegates	55,878.45
Chapter Board	33,427.94
District/SIGs	47,799.35
Services (labels)	233.09
Committees: Finance, Tellers, Nominating, Reference, Orientation	31,670.01
General & Administrative Expenses	354,797.61
Total	541,688.19

Public Relations	25 %
Website & Newsletter	46,314.44
Membership Development & Retention	15,515.62
Public Outreach	199,927.69
Business Partners of Physical Therapy	643.70
Committees: Communications	3,317.50
General & Administrative Expenses	230,253.84
Total	495,972.79

PT Fund & PAC Support	2 %
Total	49,623.36

Total 2015 Expenditures	2,011,992.07
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