

2017 in Review *Christopher Powers, PT, PhD, CPTA President*



In 2017 we focused our attention on the five pillars that comprise CPTA's mission: membership & communication, payment, access, quality practice, and education. Importantly, our strategic initiatives in each of these areas 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."

Membership in CPTA continued to grow at an all-time pace. In fact, 2017 marked the first time we surpassed 9,000 members. With respect to the public identity campaign that began in 2015, CPTA continued our multi-faceted public relations efforts to educate consumers of the benefits of direct access to physical therapist services. Specifically, our branding campaign "Physical Therapists Improve the Way You Move" was promoted in print and radio mediums across the state, as well as on various social media platforms. We also had a very strong online presence through medical oriented websites and online advertising sources. CPTA continues to devote significant chapter resources to our public relations efforts and remains committed to sending a strong message to consumers about why they should see us first!

The Payment Policy Committee was active in responding to member concerns regarding numerous payment challenges, particularly in the area of third party administrators (TPAs). CPTA is investigating the feasibility of legislative and/or regulatory changes to promote and protect provider payments under the Affordable Care Act and Workers' Compensation. A payment issues coalition was formed with other health care

associations to develop a strong advocate group against payer fraud and abuse. CPTA continues to educate members on changes in payment policies across all practice settings.

The Government Affairs Committee was actively monitored more than 100 bills that had the potential to affect physical therapist practice. CPTA successfully opposed an effort by the athletic trainers to obtain licensure in California. CPTA sponsored two successful legislative events at the capitol, both of which were well attended and highly effective in educating legislators about our challenges and concerns in the areas of payment and practice infringement. CPTA remains committed to developing and maintaining our grassroots network, key legislative relationships, and CAL-PT-PAC contributions.

The Quality Practice Committee continued its promotion of the PT Centers of Excellence Program to promote high quality patient care, patient satisfaction and compliance with federal/state laws and regulations. CPTA continues to offer practice consulting to encourage the highest level of evidence-based practice.

CPTA provided numerous education opportunities in 2017 to promote current research and evidence-based practice. Two highlights in 2017 included the Fifth Annual Research Symposium in collaboration with the CAL-PT-FUND related to early intervention in pediatric physical therapy, and held a highly successful annual conference that attracted more than 1,100 attendees.

These are just a few of CPTA's accomplishments in 2017. CPTA leadership and staff are committed to continuing work in these important areas in 2018.

Financial Overview *Dave Powers, PT, DPT, MA, MBA, CPTA Finance Officer*



CPTA ended 2017 with a strong financial position. The total surplus for 2017 was \$144,508 compared to (-\$17,130) for 2016. Much of the financial gains seen in 2017 were the result of the leadership and direction of CPTA's Finance Committee, Jennifer Guico, Michael Otahal, Richard Katz, Roland Lucas, Stuart Katzman and guidance from John T Liddle, Senior Vice President Morgan Stanley. The investment market remained strong through 2017 and CPTA benefited with strong returns on their investments.

CPTA continues to invest in our public identity through the direction of Cheryl Tibbetts. As a result, outside services was increased by \$29,984.00, 6.4% over the 2016 budget. These dollars were invested in our ongoing campaign to increase public awareness of the benefits of physical therapy. CPTA continues to receive positive feedback on our public relations.

CPTA, through the direction of Rita Pierson, continues to develop well-attended educational programs throughout the state. These programs continue to generate funds for

CPTA's 2017 operating budget—\$145,101, 25% above the estimated budget.

CPTA, through the direction of Rick Katz, remains focused on payment for our member's services—working closely with Government Affairs Committee Chair, Chris Reed and the CAL-PT-PAC Chair, Paul Smith on building relationships with payers and legislators.

CPTA membership continues to steadily grow. CPTA has continued to participate in APTA's Dues Pilot Program, in which new professionals have discounted dues that progressively increase over a five-year period. As a result, we saw a 1% decrease in projected dues. CPTA believes that over time membership will continue to grow.

CPTA, under the strong leadership of Stacy DeFoe, Executive Director and her staff, continue to hold down operating expenses—\$97,985, 4.6% less than budgeted. Closely watching expenses, CPTA staff once again put together an outstanding annual conference that was well attended by our membership. CPTA staff continues to serve membership at many levels in a cost-effective manner.

CPTA is moving forward. We appreciate the help and support of our members.

CAL-PT-PAC raised \$84,652 and received donations from 650 donors

Radio advertisements aired in Los Angeles, Sacramento and San Francisco

Online advertising on Eventful resulted in 266,512 impressions and 547 clicks to the MoveCalifornia website

Presented Annual Conference in San Diego with more than 1,100 registrants

Held PT Legislative Day in Sacramento with 100 registrants and Student Legislative Day with 153 students

Bus advertisements ran in Bakersfield, Long Beach, Oakland and Visalia

Social media ads were purchased on Google and Facebook resulting in 224,545 impressions and 1,979 clicks to the MoveCalifornia website

A Payment Issues Coalition was formed with other health care associations to develop a strong advocate group against payer fraud and abuse

ACCOMPLISHMENTS

2017 PROGRAM INCOME

Legislation	1 %
PT Legislative Day	2,000.00
Student Legislative Day	1,800.00
Total	3,800.00

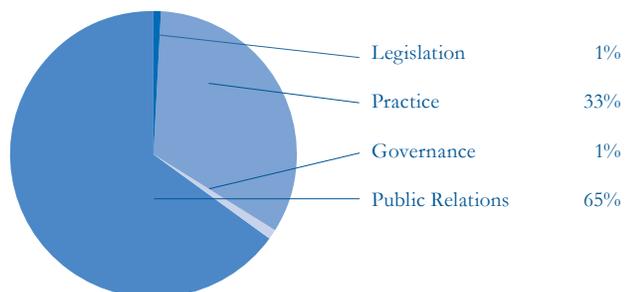
Practice	33 %
CPTA Annual Conference & Inst Courses	251,752.30
CPTA Exhibits	109,400.00
CPTA CAC Printed Program	5,620.00
Continuing Education Courses	241,426.00
Centers of Excellence Recognition Program	1,643.91
Professional Affairs Consulting Service	650.00
Continuing Education Application Approvals	82,535.00
Total	693,027.21

Governance	1 %
Interest Income	21,089.03
Services (labels)	2,835.19
Miscellaneous	2,678.98
Total	26,603.20

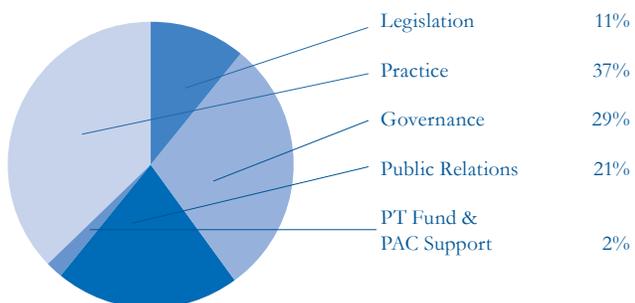
Public Relations	65 %
Membership Dues	1,204,724.05
Website & Newsletter and PT Notes Advertising	69,865.08
Business Partners of Physical Therapy	16,800.00
Shared Services	19,457.46
Miscellaneous	5,275.50
Total	1,316,122.09

Total Program Income	2,039,552.50
2017 Unrealized Gain on Investments	120,902.62
Total 2017 Income	\$2,160,455.12

INCOME



EXPENDITURES



2017 PROGRAM EXPENDITURES

Legislation	11 %
Government Relations	17,424.32
Lobbying	96,690.23
PT Legislative Day	7,470.88
Student Legislative Day	6,943.96
Committees: Government Affairs, CAL-PT-PAC	6,900.93
General & Administrative Expenses	79,246.43
Total	214,676.75

Practice	37 %
CPTA Annual Conference & Inst Courses	293,773.11
CPTA Exhibits	33,862.22
Continuing Education Courses	101,902.62
Continuing Education Program Approvals	5,422.81
Practice Expenses	2,770.53
Centers of Excellence Recognition Program	677.01
CPTA CAC Printed Program	4,458.27
Professional Affairs Consulting Service	474.29
Committees: Ethics, Payment Policy, Quality	
Practice, Awards, Education, RFP Task Force	26,476.66
General & Administrative Expenses	271,281.31
Total	741,098.83

Governance	29 %
Assembly of Representatives	33,339.29
House of Delegates	55,155.67
Chapter Board	22,054.77
District/SIGs	40,511.26
Services (labels)	326.34
Committees: Finance, Tellers, Nominating, Reference, Orientation	32,568.76
General & Administrative Expenses	418,463.99
Total	602,420.08

Public Relations	21 %
Website & Newsletter	24,236.61
Membership Development & Retention	8,101.25
Public Outreach	190,133.35
Business Partners of Physical Therapy	489.62
Committees: Communications	3,359.21
General & Administrative Expenses	193,272.79
Total	419,592.83

PT Fund & PAC Support	2 %
Total	38,158.24

Total 2017 Expenditures	2,015,946.74
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