CPTA District / SIG Leadership Orientation

December 7, 2019

VALERIE TEGLIA, PT, DPT
CPTA VICE PRESIDENT
Welcome to District or SIG Leadership... Now What?
Objectives

By the end of the day, participants will be able to:

✓ Verbalize their role and responsibilities as a district or SIG leader
✓ List concrete ways their district or SIG can support the CPTA strategic plan
✓ Find the resources available to them through the CPTA website, staff and board
✓ Leave with their questions answered
✓ Have some fun!!!
CPTA Vision and Mission

Vision
Transforming society by optimizing movement to improve the human experience.

Mission
The Mission of the CPTA is to build a community that advances the profession of physical therapy to improve the health of society through:

Educating the people in 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 Strategic goal

Physical therapists will be universally recognized and promoted as experts in human movement and function to whom consumers have unrestricted direct access.

To achieve this goal, CPTA will accomplish specific objectives in the following areas of focus:

- Public Identity
- Payment
- Access
- Quality Practice (Education and Research)
What is my Role as a District or SIG Leader?

- You are the liaison between CPTA and your members
- You bring member input to CPTA chapter leadership
- District and SIGs are extensions of CPTA leadership
CPTA Organization Chart
(or who is in charge, anyway?)
You are the **boss**!

- Help direct the strategic goal of the CPTA
- Operate under the district rules of governance, or SIG bylaws
- Set the tone and expectations for your district or SIG
- Serve as the voice of the membership
- Encourage member participation, facilitate engagement
Responsibilities of District/SIG Officers

- Establish an annual calendar of events and activities
- Lead meetings/activities or appointing someone to take the lead
- Manage resources (money, property, time, district volunteers)
- Complete required documents (minutes, reports)
- Protect member rights and privileges
- Educate members and potential members about the Association
Your obligations

for details, check out:

CBPROC-10 (Chapter Board Procedure 10)

On website, go to Leadership ➔ Reference Manual ➔ Section 3 (CBPROC)

** You should also check out the CPTA Bylaws, as nothing in CBPROC-10, District Rules of Governance, or SIG Bylaws can conflict with CPTA Bylaws. They rule.
Here are some key obligations

District Rules of Governance
and SIG Bylaws

Meetings  Finances  Elections  Governance
District Rules of Governance

- District Rules of Governance replaced District Bylaws
- Three main objectives:
  - Centralize District/SIG Finances at CPTA
  - Standardize District Rules for reduced bureaucracy
  - Combine District Treasurer/Secretary Positions
- SIGs still maintain bylaws, and function more as independent groups (no dues allocation to SIGs)
District Rules of Governance

- **Function of Districts** – Partner with CPTA to accomplish Chapter’s functions

- **District Executive Committee** – Chairperson, Vice Chairperson, Secretary/Treasurer, and Chief Representative
  - **Chairperson** – Point person for the District and serves as District’s first Assembly Rep
  - **Vice Chairperson** – Assumes the duties of the Chair as needed, coordinate/communicate District meetings
  - **Secretary/Treasurer** – Take/submit minutes, submit budget created by executive committee, process/submit District receipts to CPTA
  - **Chief Representative** – Oversees District involvement in *Year Round* governance
Executive Committee Meetings

• EC composition defined by District Rules of Order
• Meetings scheduled at your discretion—can be in person, conference call, web based
• Governed by Robert’s Rules of Order
• Guests welcome with prior notice and approval of Chairperson
• Minutes sent to CPTA Office within two weeks
District Meetings

Minimum of one Business Meeting required per year

Often paired with other events
- OK to have “member only” portions (select/sensitive topics with APTA membership cards required for that portion)
- Chapter Board members and Committee members are available for special topics
- Minutes sent to CPTA Office within two weeks
What constitutes a business Meeting?

According to our friend Robert:

A business meeting provides members with the opportunity to propose ideas and to participate in forming the plans and actions of the organization. The business of the meeting is conducted according to parliamentary procedure outlined in Robert’s Rules of Order. The agenda may include announcement of the slate of candidates, accepting nominations from the floor for District/SIG slate for elections, review or discussion relative to Assembly of Representatives Meeting motions, and any other business to facilitate the administration of the organization.
CPTA helps to manage District Finances

- Each District has a checking account under CPTA’s US Bank account
- Secretary/Treasurer is a signer on account and provided with a debit/credit card for expenses
- Check requests, expense reimbursements, and expense receipts must be submitted to CPTA
- **Expense reimbursement**: Officers or member reimbursement requests must be emailed to Lisa Ruport and district Secretary/Treasurer with a completed reimbursement form and receipts. The district Secretary/Treasurer will review the request and will ‘reply to all’ stating the request is approved
Finances

▪ Secretary/Treasurer can pay vendors using their district debit card or check. Submit receipts to CPTA.
▪ Secretary/Treasurer can deposit checks received by going to a US Bank branch or through mobile banking.
▪ Budgets are due to CPTA office by December 31
▪ Each district will receive their dues allocation funds directly to their US Bank account.
▪ Financial statements will be emailed every quarter.
▪ Refer to the DORM for more detailed information. There is a whole section on Finance
  On website, go to Leadership ➔ District Operations Resource Manual (DORM)
Elections

Procedures described in District Rules of Governance, SIG Bylaws and CBPROC-8 (Section 3 of Reference Manual)

Deadlines:
- Announce slate of candidates: Aug/Sept
- Submission of slate to CPTA: Aug/Sept/Oct
- District elections can be held by mail ballot, electronic ballot, or at a District business meeting
- Elections complete by December 1
Governance

Assembly of Representatives

Friday, October 2, 2020—Anaheim, CA

- Proposed CPTA Bylaw Amendments – June 8, 2020
- Proposed Main Motions – July 13, 2020
- Agenda and Meeting Material sent out (projected) – Aug 21, 2020
- Recommendations for candidate for CPTA Delegate – September 4, 2020
Event Insurance

- To be included in the CPTA Special Event Insurance Coverage, Districts and SIGs must provide the following to Lisa Ruport no later than January 31:

<table>
<thead>
<tr>
<th>Sponsor Name (District/SIG)</th>
<th>Name/Type of event</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date of event</td>
<td>Location of event</td>
</tr>
<tr>
<td>Estimated number of attendees</td>
<td>Need liquor liability? Yes/No</td>
</tr>
</tbody>
</table>

- Plan your events for the entire year. Our policy runs from March 2020 – March 2021. Health expos, Hands-on CE courses/labs, and events including alcohol should be submitted.

- Each event requires a separate Special Event Insurance Application. There is no additional cost unless you submit an event after the January 31 deadline or the event changes in regards to liquor liability. Since we have to request the certificate from the insurance company please allow five (5) working days to receive the certificate.
Newsletters

- Distribution shall be made only to members of the District/SIG and CPTA Board
- No more than two issues annually may be sent to prospective members – this is a member benefit!
- A copy of all newsletters must be sent to CPTA Office
- All sponsors and advertising must be clearly identified in the copy sent to CPTA (when in doubt, highlight)
Things chapter office can do for you: Work *smarter*, not harder!

- Email to your members
  - District/SIG newsletters
  - Meeting notices
  - Notices of District or SIG Sponsored Continuing Education
- List District/SIG meetings, events, and courses on your District/SIG page on the CPTA website—You can find the link at the top of the home page
- Provide swag (promotion material) for PR Events
- Provide you with CPTA’s “GoTo Meetings” account for meetings
Welcome to CPTA Leadership!
You have a lot of support... so please reach out for help!

- Chapter Staff
- CPTA Board Liaison and Committee Chairpersons
- Quarterly District/SIG Leadership Calls
- District Operations Reference Manual (DORM) on website
- Past District/CPTA/APTA Leaders

Enjoy the upcoming Year!
CPTA Strategic Goal
Vision

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Mission

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  - Educating the people of California about the unique attributes, benefits, and value of physical therapy;
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Advocacy
2020 Activities

- Monitor the Title 22 proposed regulatory amendment submitted to DPH and DHCS, aligning the regulations with B&P Section 2620.1 Direct Access to PT Treatment regardless of practice setting.

- Consider an action to achieve revision of Title 22 before December 31, 2020.

- Protect the profession against practice infringement i.e. AT scope expansion bill
How Can Your District or SIG Support the Committee?

- Invite candidates to speak at a district/SIG meeting
- Set up meetings with legislators or staff in their district office
- Bring large delegation of physical therapists, physical therapist assistants, and students to CPTA Legislative Day on March 10, 2020.
2020 Activities

- CAL-PT-PAC will work to raise $200,000 in CAL-PT-PAC contributions
- CAL-PT-PAC and the Ethics and Professionalism Council to offer an Ethics & Law course in conjunction with a PAC fundraiser at four DIS/SIGs in 2020
- Develop a DIS/SIG PAC Toolkit for additional local support
How Can Your District or SIG Support the Committee?

- Appoint a District/SIG Advocacy Chairperson
- Attend Quarterly Advocacy Chairperson Conference Calls
- DIS/SIG leaders can participate in the 2020 Leadership Challenge
- Sponsor 2020 CAL-PT-PAC Dinner in Anaheim, CA
Payment Policy
2020 Activities

- Potential legislation to promote & protect provider payments under the ACA
- Educate the membership on changes in payment policies across all practice settings.
- Provide information and guidance on how to practice in a changing payment environment, with focus on merit-based incentive payment systems (MIPS) and Patient Driven Payment Model (PDPM) and Patient-Driven Groupings Model (PDGM).
How Can Your District or SIG Support the Committee?

- Build relationships with claims adjusters, medical reviewers, medical directors to improve payer-provider communications
- Include Payment articles in District/SIG newsletter
- Support CPTA’s Grassroots Campaign to demonstrate payment challenges to Department of Managed Health Care
Member Services & Public Relations
2020 Activities

- Purchase radio and bus advertisements
- Purchase advertising on WebMD Online
- Offer five student scholarships of $1,000 each
- Conduct Town Hall meetings in Northeast, San Diego and Golden Gate districts
How Can Your District or SIG Support the Committee?

- Hold at least two PR events in your district using PTs Improve the Way You Move campaign (PT Pub Nights fall under membership, not PR)
- Appoint a PR Chair
- Appoint a District Member Services Liaison (DMSL)
- Recruit new members
Diversity Affairs Task Force
2020 Activities

- Develop opportunities to highlight diversity, equity and inclusion in the association.
- Inform, educate, and inspire underrepresented groups in the community about the profession of physical therapy as a viable career path.
- Develop materials for educating members about the importance of diversity, equity and inclusion.
- Develop a coordinated social media strategy that highlights diversity, equity and inclusion within CPTA and the public.
How Can Your District or SIG Support the Task Force?

- Help us identify elementary, middle and high-schools in your district with underrepresented groups and take part in outreach!

- Nominate people for leadership positions that are diverse with underrepresented groups.

- Educate district members on the importance of diversity, equity, and inclusion in the Association as well as strategies for best practice.

- Spread the word about the Diversity Affairs Committee to members to increase awareness of CPTAs efforts of improving diversity, equity, and inclusion within the Association.
Education
2020 Activities

- CPTA Annual Conference October 3-4 Anaheim Hilton
- California Student Conclave March 28
- CAL-PT-FUND Research Symposium April 25-26
- Six Credentialed Clinical Instructor Program courses
- Four clinical con-ed courses
- 10-12 webinars
- Black out dates for 2020 are September 12 – October 18
How Can Your District or SIG Support the Committee?

- Post course and conference dates on your website, publication, calendar and other lists of upcoming events.
- Participate when a CPTA Sponsored Con Ed course is being held in your area.
  - Promote upcoming meetings
  - Meet members and non-members
  - Recruit volunteers for special events
  - Raise awareness of your needs
- Attend an Education Committee meeting.
Quality Practice
2020 Activities

- Provide education on the usefulness of the CPTA Resource Manual promoting compliance with Federal/State laws and regulations and community standard of care
- Contribute articles, as needed to *PT Interventions* discussing current evidence-based quality PT practice
- Educate the membership about Ethics, Professionalism, Laws, and Regulatory compliance via webinars, DIS/SIG continuing education offerings, CPTA Ethics Forum and all other education opportunities
How Can Your District or SIG Support the Committee?

- Invite a Quality Practice Committee member to a District/SIG Meeting to present a clinical topic while offering CEUs
- Include Evidence-Based Practice articles in District/SIG newsletters and on your respective websites
- Promote the CPTA Resource Manual at every DIS/SIG meeting
Who is the CAL-PT-FUND?

- We are the only organization in California dedicated to PT research in California by California researchers

- The FUND awards up to $20,000 in research grants to California PT researchers
  - Only open to California members – PTs, PTAs, and students are eligible
  - Encourage your district members to apply
  - The deadline is August 28, 2020
How Can You Support the FUND?

- **Provide Sponsorships for FUND events**
  - Barrels & Brews
  - Ride for Research

- **Host a fundraising event to raise money for the FUND**
  - Con Ed courses – a portion of registration can be donated to the FUND
  - Ride for Research PT Pub Night/reception

- **Promote FUND events and distribute contribution forms at your District meetings**
Awards
How Can Your District or SIG Support the Committee?

- **Nominate members for the Rising Star Award.**
- **Identify members who are potential candidates.**
  - Noland Award of Merit
  - James B McKillip Leadership Award
  - Charles Magistro Service Award
  - Clarence Hultgren CPTA Service Award
  - Steve Watson Award PAC Award
- **Write a letter of support.**
Questions?