



Strategic Roadmap to 2016 & Beyond

Strategic Priority: Increase WOTA's reach through membership.

Tactic	Progress	Next Steps	Assigned To	Completed By
Simplify membership categories	Incorporated simplification of categories into bylaws revisions; to be voted on at the October 2015 member business meeting	Incorporate new structure in membership renewals	Board & Staff	2017
Provide all members with membership cards and CE tracking log	Will be possible through new database software in December 2015	Investigate membership cards; Incorporate tracking log into YM setup and market to members	Staff	2016
Send holiday and birthday communications offering \$10 off CE program coupon.	None	Incorporate into membership and marketing strategy and timeline	Staff	2016
Offer membership gala event	Potentially hold in April in conjunction with OT month; Possibly pull business meeting and awards out of conference and offer with gala; Offer leadership development session and new member orientation; Rotate location with conference; seek sponsorship	Decide whether to pursue this initiative at October Board meeting	Board	2016
Enroll members in auto renew	Offered in March 2015	Incorporate into YM setup	Staff	2016

Strategic Priority: Increase WOTA's reach through education.

Tactic	Progress	Next Steps	Assigned To	Completed By
Offer 4 "skill share" events per year	4 CE activities offered in 2015	Plan 4 CE events for 2016	Education Co-Chairs	2016
Activate district activity by collaborating with CE events	None	Initiate collaboration between CE Co-Chairs and District Chairs	Education Co-Chairs and District Chairs	2016
Explore partnerships with online CE vendors	None	Consider recording conference sessions and post for sale on website	Staff	2017
Provide CE article links in the newsletter and on the website	Discussed how often the newsletter should be published	Determine frequency of newsletter publication; Develop 2016 editorial calendar	Board & Staff	2016
Develop Policy & Procedures & Tool Kits for District Chairs & CE Events	Discussed holding orientation for district chairs, developing toolbox for district chairs and standardized guidelines for CE activities	Hold call/meeting to develop plan	Education Co-Chairs, District Chairs & Staff	2017

Strategic Priority: Enhance and create opportunities for connections between OT members in Wisconsin.

Tactic	Progress	Next Steps	Assigned To	Completed By
Enhance social media presence to drive traffic to website	Discussed focusing on practice areas and using expertise from SIS chairs; Start a "Question of the Week" campaign; Highlight state events	Develop social media strategy and implementation plan	Board & Staff	2016
Enhance the newsletter	Discussed shortening articles and linking to social media; Reducing frequency of newsletter publication and sending a weekly member communication	Develop membership & marketing strategy and timeline	Board & Staff	2016
Establish a corporate membership program	In progress; task force created and developed plan	Implement in January 2016	Board & Staff	2016
Develop ICD10 Q&A and resource page	None	Determine who will develop	Board	2016
Enhance the website	Discussed developing new resources, including an Ask the Expert section; Discussed enhancements available through upgraded database (i.e. forums, groups, blogs)	Identify resources and develop plan	Board & Staff	2016

Strategic Priority: Strengthen WOTA's infrastructure to better serve the OT community.

Tactic	Progress	Next Steps	Assigned To	Completed By
Provide brief monthly updates to the Board	Currently implemented	Add upcoming actions to report	Staff	2015
Fill or eliminate all vacant Board/Standing Committee/SIS positions	Call for nominees included in September newsletter; Discussed adding areas of expertise to membership profiles; Develop a pipeline presentation at the annual meeting explaining what it means to be a WOTA board member; Personalize why Board membership is meaningful	Engage in discussions with member at WOTA booth at conference; Personal outreach to potential board members; Update membership profiles to add areas of expertise; Discuss holding pipeline presentation at 2016 annual meeting	Board & Staff	2016
Digitize Policy & Procedures Manual	None	Update to ensure accuracy and digitalize	Staff	2016
Offer FAQ pages on website	Discussed creating a conference detail page and legislative detail page, and ensuring they are updated	Write copy and post on website	Staff, Conference Co-Chairs & Legislative Chairs	2016
Send a membership survey	Ask how do people prefer to receive information from WOTA; Ask why did you join/why didn't you renew? What resources do you want on the website?	Develop and distribute survey	VP of Membership and Staff	2016
Hold an in-person Board orientation session and one additional in-person meeting annually	Discussed holding in-person meetings in Spring and Fall	Determine 2016 meeting schedule	Board & Staff	2015

Strategic Priority: Implement WOTA's legislative agenda.

Tactic	Progress	Next Steps	Assigned To	Completed By
Introduce and pass the Adaptive Equipment Bill.	Have changed initiative to trying to make the requirements in the bill be required by the Dept. of Transportation then we don't have to go thru the legislative process	Bob Welch will schedule a meeting with the Deputy Sec. of DOT and Stephanie Gifford will attend via conference call.	Legislative Chair Bob Welch Stephanie Gifford	2016
Continue coalition work with WPTA and WSHA on Medicaid issues related to prior authorization denials.	Successful in getting the PA process taken out of the OIG Office of Inspector General Successful in getting an audit called by the legislature on the PA reviewers for the large amount of therapy denials Met with the 2 deputy Secretaries of DHS and defined the problems with PA denials and offered solutions to problems. Met with 2 legislators Senator Luther Olson and Rep. John Nygren to make them aware of the issues. Nygren is the one who asked for the audit Have participated in 10 coalition meetings and 5 meetings with legislators over the last two years	Met with Rep. San Fillipo on the Health Comm. and he is holding a public hearing on several of the issues the coalition has defined. Dec. 16 Jan Stevens will testify on behalf of WOTA and the coalition will again ask for changes in the PA process. Coalition continues to meet and will meet regularly to put constant pressure on the Dept. of Health Services	Legislative Chair Bob Welch Jan Stevens Legislative Chair Bob Welch Jan Stevens	2016
Continue working on removing Physician referral from licensure rules.	SUCCESS almost a done deal. Teri reviewed the proposed OT self referral and removal of physician referral language written by the OTACB and wrote testimony for the Public Hearing that was conducted by the OTACB on Dec. 2 nd . Bob Welch delivered the testimony and they made WOTA suggested changes	Now the administrative rules go to the legislature administrative rules committee and will most likely be reviewed and sent to the Governor for final approval, They should be in effect by the spring of 2016	Legislative Chair Bob Welch	2016
Continue working on getting sensory integration out of the TIAC Committee review.	Teri made a formal written request to remove SI from the TIAC review process because it is a medical intervention and the committee's mission is to review non-medical interventions. The DEprtment of Long Term Care and DPI Teri attended the October 30 th meeting of the TIAC where they reported on a third review of Sensory Integration research. They found 3 new articles and only one of them supported the efficacy of SI so they assessed it at a level 4 again.	Bob and I are planning on talking to legislators related to SI still being reviewed to see if we can get it removed from the TIAC review process	Legislative Chair Bob Welch	2016
Develop a committee to update the 23 year-old Medicaid language and offer it to the department.	Four OTs have agreed to be on the committee with a another person who will review the work completed	Get the Medicaid language to the comm. .members	Legislative Chair Committee & Board	2016
Rewrite the COTA supervision language for home health to	Teri submitted a request at the June meeting of OTACB asking for the board to make minor changes	Monitor the process, review the scope statement for accuracy get OTs/ OTAs to testify	Legislative Chair OTAs and	2016

remove the onsite supervision requirement.	in the OTA supervision language. It was tabled until the December meeting. At the dec. meeting a written request with suggested changes was given to the board. The board voted and developed a request for a scope statement to start the process of changing the supervision rules. Teri invited an OTR Toot Gramling and a COTA Karen Crook who have worked in B-3 to attend the meeting and describe how difficult it can be to meet the requirements when they sometimes only see a child once a month They were very helpful in persuading the board to make changes..	at the public hearing	OTs who work in home health and B-3	
Change DPI language to allow OTs to see children if they do not have an EEN, so they can be a part of Response to Intervention.	Teri to contact the OT consultant at the DPI start the legislative process to add language that allows OTs to see children in regular education. I plan on using Iowa language to do this.	Contact DPI start the rule change process	Legislative Chair Bob Welch	2016
Challenge the counties and systems that are running B-3 programs on scope of practice violations. Work with the coalition on these.	Marni Ginsberg and Teri Met with Terri Enters the head of the B-3 program to start to be informed about the primary provider model	Gather concerns from B-3	Legislative Chair & Board	2016