

## EXECUTIVE SUMMARY

### **“A Strong Voice for Occupational Therapy in Alberta” Society of Alberta Occupational Therapists – 5 year Strategic Plan – 2014-2018**

#### ***Overview***

---

The Society of Alberta Occupational Therapists (SAOT) is a voluntary, non-regulatory body formed in 2003 to provide networking and education opportunities for its members and advocates for occupational therapy to government, insurers and the public.

The mission of SAOT is:

*SAOT is dedicated to the wellbeing of all Albertans. We are the vehicle to drive practice, shape capacity and grow the profession of occupational therapy in Alberta – by bridging research, practice, advocacy and policy.*

#### ***About the Strategic Plan***

---

In September of 2013, the SAOT Board of Directors completed a 5-year Strategic Plan to guide the organization from 2014-2018. The Strategic Plan, which will be reviewed and updated annually, is based on the following inputs:

- 1) SAOT member survey
- 2) SWOT analysis
- 3) Current and future financial projections
- 4) Strategic planning session held with board members in September 2013.

#### ***1) Survey of SAOT Members’ Needs and Expectations***

---

In September 2013, SAOT conducted a member survey to identify needs and expectations. The Strategic Plan directly addresses the top six priorities identified by SAOT members:

- Sponsoring and facilitating education
- Providing professional liability insurance
- Advocating for and marketing occupational therapy
- Disseminating pertinent practice and practical information
- Keeping members informed about relevant changes to legislation
- Maintaining information sharing and professional networking – including maintaining an effective website

#### ***2) SWOT Analysis***

---

SAOT also conducted a SWOT analysis to evaluate the organization’s strengths, weaknesses, opportunities and threats.

SAOT’s **strengths** are strong leadership, increasing membership, website, education opportunities, ACOT funding and relationship, policy advice, and board capability.

SAOT's **weaknesses** are the scale of OT membership (SAOT currently represents only 26 per cent of OT's in Alberta), limited resources, and low awareness.

SAOT's **opportunities** are ACOT funding support, growing volunteer base, requests to represent OT in health discussions, new advocacy position, high quality education workshops, social media, and board decision-making and accountability.

SAOT's **threats** are potential role erosion, limited growth in membership, limited recruitment of volunteers, and potential challenges of working with a separate regulatory council.

### **3) Strategic Planning Session: Five Core Strategies and Key Goals**

The Strategic Plan consists of five core strategies developed by the SAOT Board of Directors. Within each core strategy, SAOT has also identified its key goals. *(Note: The highlights of the key goals are outlined below, and all goals are listed in the Strategic Plan.)*

Core Strategy	Highlights of the Key Goals
1. Demonstrating Relevance of SAOT and the Profession	<ul style="list-style-type: none"> <li>• Develop a comprehensive Marketing Plan to increase awareness of occupational therapy in Alberta (includes social media strategy, presentations and materials, information sessions, networking events, OT month materials, etc.)</li> <li>• Increase membership</li> <li>• Improve member satisfaction</li> </ul>
2. Engaging Meaningfully with Members and all Stakeholders	<ul style="list-style-type: none"> <li>• Increase the participation rate of members in the society's volunteer work</li> <li>• Develop a sense of "OT Community"</li> </ul>
3. Collaborating and Leading in Healthcare Policy	<ul style="list-style-type: none"> <li>• Influence health policy</li> <li>• Be at the forefront of policy discussions (i.e. SAOT is requested by partners and policy makers to be at sessions regarding health policy and health operational change)</li> </ul>
4. Producing Excellent Professional Development	<ul style="list-style-type: none"> <li>• Solicit ongoing input and feedback from the membership in order to identify professional development needs for the profession</li> </ul>
5. Building Financial Sustainability and Self Reliance	<ul style="list-style-type: none"> <li>• Diversify funding and establish ongoing and predictable sources of funding for the long term</li> </ul>