

Coalition of Occupational Therapy Advocates for Diversity Strategic Plan 2022-2027

Plan Development

This plan was developed over the course of Spring and Summer of 2022. The first stage involved pre-planning and consideration from the already existing COTAD leadership to prepare for an all-call event that invited all COTAD members to a town hall in March of 2022. From this event, the leadership incorporated membership feedback and ideas into conversation and ongoing development of goals and initiatives included in the plan. These ideas were refined, streamlined, and prioritized by leadership into the final plan. This final document was presented to and accepted by the COTAD Board of Directors in August of 2022 and is presented to the Membership.

The Framework

This plan was developed to consider the overarching objectives and populations that COTAD's mission serves. This led us to 4 key focus areas for our work: Organizational Development, Practitioners, Students, and Faculty. Below we define and unpack the work and outcomes COTAD seeks to accomplish within these 4 key focus areas in the next 5 years.

Organizational Development: This area includes actions and initiatives that support the organizational capacity of COTAD national, focused in developing intra-organizational processes and sustainability, particularly as the organization has grown so significantly over the past several years.

Practitioners: This area includes actions and initiatives that support two main purposes. First, to support and provide mentorship to practitioners from historically minoritized or excluded populations. Second, to offer resources and education for all practitioners to increase their cultural humility, anti-oppressive advocacy, and justice-oriented contributions to occupational therapy practice.

Students: This area includes actions and initiatives that support two main purposes. First, to support and provide community to students from historically minoritized or excluded populations. Second, to facilitate leadership and student-led initiatives to increase cultural humility, anti-oppressive advocacy, and justice-oriented contributions to occupational therapy education.

Faculty: This area includes actions and initiatives that support two main purposes. First, to support and provide networks to faculty from historically minoritized or excluded populations. Second, to facilitate faculty leadership, research, and engagement to increase cultural humility, anti-oppressive advocacy, and justice-oriented contributions to occupational therapy education, practice, and research.

In developing these strategic actions, the leadership sought ideas and actions that had as many of the following qualities as possible:

Realistic: Likely able to be accomplished in the next 5 years given the context of the organization's size, scope of work, and capacity.

Sustainable: Contributes to the stability, operationally or financially of the organization as whole, leaning forward in its thinking toward strategic long-term sustained initiatives rather than one-off programs.

Measurable: Quantitative or qualitative data can be collected to measure the success and/or outcomes of the action taken, relative to the perspective of COTAD leadership and membership.

Anti-oppressive: Pushes back against systemic, cultural, and structural forms of discrimination, dehumanization, and colonization.

Revenue Generating: Creates opportunities for financial support to be oriented toward the organization through donations, fee-for-service, fee-for-product, or other means.

The Plan

Below you will find the action and initiatives of the plan organized into goals, objectives, strategies, and indicators. Goals are broad, overarching, wide sweeping outcomes sought in each focus area. Objectives are broad outcomes the organization would like to achieve in that focus area. Strategies are concrete approaches that could be employed to achieve those outcomes, and indicators are the measures of the success of those strategies.

Organizational Development

Goal 1: Support the financial and operational sustainability of the COTAD, including support for COTAD staff, corporate governance, strategic partnerships, and membership engagement to contribute to the organization's work and mission.

Policies & Procedures Objective 1.A: Develop protocols and processes for shared governance to support accountability, transparency, responsiveness, and effectiveness among Board of Directors, Committees, and general membership.

Strategy 1.A.1: Develop and regularly review professional and detailed bylaws for governance shared among Board of Directors, Committee Chairs, Staff, and Membership (including Students).

Responsible: BOD

Indicator 1.A.1.a: An attorney is consulted to develop and draft the bylaws to formally situate and describe the roles, responsibilities, authority, and election of the BOD and Committee Chairs according to Missouri State Non-Profit law.

Indicator 1.A.1.b: Bylaws are made publicly available online, feedback from membership is requested, and incorporated into bylaw development

Indicator 1.A.1.c: Bylaws are approved by the Board of Directors and reviewed and revised as needed after 3 years

Strategy 1.A.2: Develop and regularly review standard operating procedures (SOPs) for committees.

Responsible: BOD, Committee Chairs

Indicator 1.A.2.a: Each committee develops and reviews annually standard operating procedures that describe committee roles, practices, and processes for accomplishing the tasks within their purview.

Indicator 1.A.2.b: SOPs are approved by the BOD; any subsequent alterations are also approved by the BOD.

Indicator 1.A.2.c: Committees and BOD meet on a regular and consistent basis according to the SOPs.

Strategy 1.A.3: Legally protect the national organization in relation to issues of liability, intellectual property, conflicts of interest, and

Indicator 1.A.3.a: Attorney is consulted regarding policies and legal practices to ensure liability protection.

<p>other necessary legal protection identified by a consulting attorney.</p> <p><i>Responsible:</i> BOD</p>	<p><i>Indicator 1.A.3.b:</i> Attorney is consulted regarding policies and legal practices to ensure intellectual property can be strategically and selectively shared.</p>
	<p><i>Indicator 1.A.3.c:</i> Committee Chairs are effectively educated and use practices and procedures in regards to these organizational protections.</p>

<p>Infrastructure Objective 1.B: Develop and coordinate sustainable organizational infrastructure that formally engages membership in strategic and participatory ways.</p>	
<p>Strategy 1.B.1: Organizational structure is infused with familiar and community-oriented approaches that also amplify the voices of those who have been historically excluded.</p> <p><i>Responsible:</i> BOD, Committee Chairs</p>	<p><i>Indicator 1.B.1.a:</i> Directors, Chairs, and Members feel engaged, listened to, and welcomed into the COTAD community.</p>
	<p><i>Indicator 1.B.1.b:</i> Standard meeting practices and procedures that honor the values and principles of COTAD, particularly accessibility and inclusivity, are developed and implemented in Board and Committee meetings.</p>
	<p><i>Indicator 1.B.1.c:</i> All committees will have diverse participants (professionally and demographically) in their roles.</p>
	<p>Indicator 1.B.1.d: Committees include roles that are accessible* and engaging for membership, with opportunities to take on different levels of responsibility and participation.</p> <p><i>*We define accessible committee membership as:</i> Available committee positions are diverse in their commitments of time, term, and talents while also having clear and planned expectations for responsibilities, including support for costs of travel or other commitments when appropriate.</p>
	<p><i>Indicator 1.B.1.e:</i> All committees will have at least 5 regular members attending meetings.</p>
<p>Strategy 1.B.2: Hire staff to manage regular operations and some program development of COTAD national.</p>	<p><i>Indicator 1.B.2.a:</i> Certain BOD members are elected who have experience in HR and non-profit management.</p>

<i>Responsible:</i> BOD	<i>Indicator 1.B.2.b:</i> An executive director position is created and filled by year 5 of the strategic plan.
	<i>Indicator 1.B.2.c:</i> A social media/website manager position is created and filled by year 1 of the strategic plan.
	<i>Indicator 1.B.2.d:</i> By the end of year 5, the executive director, in collaboration with the BOD, will coordinate the development of the following subsequent 5-years strategic plan which may include further paid positions.
<p>Strategy 1.B.3: Regularly identify operational and leadership gaps that may affect program continuity and organizational performance</p> <p><i>Responsible:</i> BOD, Committee Chairs</p>	<i>Indicator 1.B.3.a:</i> Annual SWOT analysis is conducted of organization infrastructure
	<i>Indicator 1.B.3.b:</i> Strategic succession processes are considered and completed for each role within the BOD and committee structure (e.g. chair elects come on with an overlap of current chairs)
	<i>Indicator 1.B.3.c:</i> Identified pathways of leadership are developed throughout the org that facilitate leaders moving into more responsibility.
<p>Strategy 1.B.4: COTAD National communicates with membership regularly, proactively, and in timely ways.</p> <p><i>Responsible:</i> Comms</p>	<i>Indicator 1.B.4.a:</i> Social media and other communications are produced in regular, consistent, and accessible branding
	<i>Indicator 1.B.4.b:</i> Newsletter continues to be produced quarterly
	<i>Indicator 1.B.4.c:</i> Social media engagement increases each year
	<i>Indicator 1.B.4.d:</i> Members are notified of important events and organizational engagement opportunities such as elections and board meetings in timely manners

Financial Objective 1.C: Develop financial sustainability and diverse revenue sources across the organizational structure.	
Strategy 1.C.1: Bring COTAD in line with generally accepted accounting principles and practices	<i>Indicator 1.C.1.a:</i> A financial analyst or accountant is consulted to complete a standard audit and offers recommendations

<i>Responsible:</i> BOD	for regular accounting processes.
	<i>Indicator 1.C.1.b:</i> Organizational budget and account statuses are made available to membership annually.
	<i>Indicator 1.C.1.c:</i> Organizational budget and account statuses are made available to BOD and Committee Chairs on a monthly basis.
Strategy 1.C.2: Strategically budget funds for programs and initiatives identified by committees <i>Responsible:</i> BOD	<i>Indicator 1.C.2.a:</i> Committee chairs have general budget allocations for the programs for which they are responsible.
	<i>Indicator 1.C.2.b:</i> Committee chairs make informed decisions about programming in relation to the financial realities of the organization
	<i>Indicator 1.C.2.c:</i> Committee chairs are in regular communication with BODs about funds needed for programs or initiatives.
Strategy 1.C.3: Develop and stabilize diverse revenue streams. <i>Responsible:</i> BOD	<i>Indicator 1.C.3.a:</i> A mechanism to regularly sell merchandise for revenue is developed.
	<i>Indicator 1.C.3.b:</i> At least one major fundraising campaign is held annually
	<i>Indicator 1.C.3.c:</i> Donor relationships are consistently developed, stewarded, and offered opportunities to give major gifts to support prioritized initiatives

Partnerships Objective 1.D: Implement a comprehensive process by which the organization strategically advances partnerships with organizations that strengthen the effectiveness & efficacy in executing JEDI, anti racism, anti oppression initiatives.	
Strategy 1.D.1: Effectively prepare partnership priorities and strategies with mission-adjacent organizations or impact-adjacent initiatives <i>Responsible:</i> BOD	<i>Indicator 1.D.1.a:</i> Priority and intended outcomes for partnerships are identified.
	<i>Indicator 1.D.1.b:</i> Implement logic model that communicates rationale and strategy for development of partnerships
	<i>Indicator 1.D.1.c:</i> Conduct a thorough assessment of the depth and breath of JEDI work that at least 5 other professions and associations are implementing

Practitioners

Goal 2: Improve support and sense of community with/within COTAD for occupational therapy practitioners from historically minoritized and excluded backgrounds.

Professional Development Objective 2.A: Support the professional development of practitioners from historically minoritized and excluded backgrounds

Strategy 2.A.1: Provide a variety of opportunities for practitioners-to-practitioner support with each other in community (outside of mentorship).

Responsible: COTAD Comms, COTAD Engage

Indicator 2.A.1.a: A map and/or state by state listing of COTAD members is created and made available to members to allow opportunities for in-person meet ups and networking at state conferences, serving on state committees, sharing local CEUs or events, and local Communities of practice.

Indicator 2.A.1.b: At least 2 other non-workshop or mentorship opportunities are identified and considered to support practitioner-to-practitioner engagement.

Strategy 2.A.2: Provide professional development resources presented by COTAD members (or external presenters) on a variety of related topics for CEU or PDUs to enhance educational and professional skills related to diverse clients and equitable care across lines of difference and power.

Responsible: Practitioner Committee

Indicator 2.A.2.a: At least one event or workshop oriented toward professional development skills or education is provided every Spring, Summer, and Fall.

Indicator 2.A.2.b: AOTA, NBCOT, or individual state CEU/PDU credit is provided for COTAD hosted professional development events

Indicator 2.A.2.c: Develop Case Study Library project by soliciting for submissions from membership and executing dissemination plan

Mentorship Objective 2.B: Support specific mentorship opportunities and relationships among practitioners from historically minoritized and excluded backgrounds.

<p>Strategy 2.B.1: Connect experienced practitioners with new grad practitioners of similar backgrounds or experiences through the COTAD Mentorship program.</p> <p><i>Responsible:</i> Practitioner Committee, Sub-committee: CMP</p>	<p><i>Indicator 2.B.1.a:</i> COTAD Mentorship Program admin team, cohort size, and model are optimized to meet the current demand.</p>
	<p><i>Indicator 2.B.1.b:</i> CMP differentiates programming for 2 subgroups: 1) transitioning from practitioner to academia 2) pre-OT.</p>
	<p><i>Indicator 2.B.1.c:</i> Both mentors and mentees report a high satisfaction in CMP experience via exit survey</p>
	<p><i>Indicator 2.B.1.d:</i> The CMP supports at least 30 mentees each year.</p>
<p>Strategy 2.B.2: Develop asynchronous COTAD Mentor Training Academy</p> <p><i>Responsible:</i> Practitioner Committee, Sub-committee: CMP</p>	<p><i>Indicator 2.B.2.a:</i> A robust evidence-based mentor training is developed that educates on using best practices when mentoring minoritized OTP populations.</p>
	<p><i>Indicator 2.B.2.b:</i> Mentors will report high satisfaction and utility from participation in training.</p>
<p>Strategy 2.B.3: Offer opportunities for mentors to host workshops for mentees at large.</p> <p><i>Responsible:</i> Practitioner Committee, Sub-committee: CMP</p>	<p><i>Indicator 2.B.3.a:</i> Workshops will be presented by mentors or practitioners to CMP participants specific to issues new grads face.</p>
	<p><i>Indicator 2.B.3.b:</i> Mentees will report high satisfaction and utility from these workshops.</p>

Students

Goal 3: Improve student experiences and educational outcomes for occupational therapy and occupational therapy assistant students from historically minoritized and excluded backgrounds.

Academic Safety Objective 3.A: Foster inclusive and safe communities within OT/OTA educational programs that represent, celebrate, and support experiences from historically minoritized and excluded backgrounds.

<p>Strategy 3.A.1: Support and manage the COTAD Chapters Programs to grow and sustain</p> <p><i>Responsible:</i> Chapters</p>	<p><i>Indicator 3.A.1.a:</i> Maintain existing COTAD Chapters with 5 or less Chapter “closing” each year.</p>
<p>Strategy 3.A.2: Host regular student-oriented educational programs about DEI, anti-oppression and antiracism, led and developed by student leaders.</p> <p><i>Responsible:</i> Chapters, Ed</p>	<p><i>Indicator 3.A.1.b:</i> Chapters will increase numbers of at least 5 Chapters per year, reassessing the sustainability of the aforementioned number each year.</p>
	<p><i>Indicator 3.A.2.a:</i> The Chapter Committee will hold 4 educational programs (i.e. capsules) each year that receive overall high satisfaction from attendees.</p>
	<p><i>Indicator 3.A.2.b:</i> COTAD Chapter Committee will hold at least two networking events yearly that receive overall high satisfaction from attendees</p>
	<p><i>Indicator 3.A.2.c:</i> Students are invited to submit an engagement survey in order to assess their sentiments on feeling supported, safe, and well-educated about these topics through COTAD</p>
	<p><i>Indicator 3.A.2.d:</i> Students and faculty are invited to submit an engagement survey in order to report their experiences about safety and inclusivity in their programs.</p>

Leadership Objective 3.B: Empower, support and guide a network of student voices and advocacy at occupational therapy and occupational therapy assistant programs across the United States.

<p>Strategy 3.B.1: Support a pathway to leadership roles within COTAD and COTAD Chapters</p> <p><i>Responsible:</i> Chapters</p>	<p><i>Indicator 3.B.1.a:</i> By the end of the first year of the plan, the The Chapter Committee Pipeline Leader position will have defined roles and responsibilities.</p>
<p></p>	<p><i>Indicator 3.B.1.b:</i> The Chapter Committee Pipeline Leader will develop a streamlined recruitment strategy to promote smooth transitions of standout student Chapter</p>

	leaders into COTAD national volunteer roles.
	<i>Indicator 3.B.1.c:</i> Students are invited to submit an engagement survey in order to share their leadership skill development through involvement with COTAD Chapters
	<i>Indicator 3.B.1.d:</i> At least 25% of COTAD Committee Chairs are consistently former COTAD Chapter leaders.

Fieldwork Safety Objective 3.C: Foster inclusive, supportive, and safe environments in fieldwork for students from historically minoritized and excluded backgrounds.	
Strategy 3.C.1: Build programming that specifically targets students who are currently on fieldwork Responsible: Chapters	<i>Indicator 3.C.1.a:</i> Office hours/discussion forums for students on fieldwork are hosted.
	<i>Indicator 3.C.1.b:</i> Students participants report high satisfaction and support from programming
Strategy 3.C.2: Create or advocate for the creation of a COTAD/DEIJ fieldwork educator and coordinator workshop/certificate Responsible: Ed, BOD	<i>Indicator 3.C.2.a:</i> COTAD reached out to 2-3 strategic partners to initiate this
	<i>Indicator 3.C.2.b:</i> A plan and curriculum is developed that will be included for this certificate
	<i>Indicator 3.C.2.c:</i> Certificate program is launched
Strategy 3.C.3: Advocate for a component of the fieldwork educator/site evaluation to include inclusivity/equitable practices Responsible: Ed, Chapters	<i>Indicator 3.C.3.a:</i> COTAD had meetings, wrote letters, or strategized with ACOTE/AOTA to work toward inclusion of components addressing these areas.
	<i>Indicator 3.C.3.b:</i> AOTA student evaluation form was adjusted to include factors that address equitable and inclusive practices by educators.
	<i>Indicator 3.C.3.c:</i> AOTA fieldwork educator evaluation form is adjusted to include the factors that address equitable and inclusive practices by students.

<p>Strategy 3.C.4: Provide support on how to navigate challenging situations, power dynamics, etc.</p> <p><i>Responsible:</i> Chapters</p>	<p><i>Indicator 3.C.4.a:</i> The Chapters Committee held 2 yearly trainings, workshops, and meet-ups, and provided resources for students during fieldwork.</p>
	<p><i>Indicator 3.C.4.b:</i> Chapters committee created or updated resources regarding this topic available to COTAD Chapters</p>
<p>Strategy 3.C.5: Create a COTAD advocating/petitioning/lobbying group to work with NBCOT/AOTA/ACOTE to advocate for the needs/safety of students on fieldwork</p> <p><i>Responsible:</i> BOD</p>	<p><i>Indicator 3.C.5.a:</i> Create a volunteer position or committee role to specifically advocate with other national OT organizations with and on behalf of fieldwork students.</p>

Faculty

Goal 4: Foster a collaborative and supportive environment for occupational therapy educators to implement and promote justice, equity, diversity, inclusion, anti-racism and anti-oppression in occupational therapy education.

Student Recruitment and Retention Objective 4.A: *Empower faculty to utilize evidence-based strategies to prepare occupational therapy practitioners for meeting the needs of diverse populations and to enhance student recruitment and retention from historically minoritized and excluded backgrounds.*

<p>Strategy 4.A.1: Support OT/OTA educators to identify needs and implement actions in OT/OTA education to advance future practitioner knowledge of diverse populations.</p> <p><i>Responsible:</i> Ed</p>	<p><i>Indicator 4.A.1.a:</i> Create a minimum of one training opportunity per year that receives high satisfaction from attendees</p>
	<p><i>Indicator 4.A.1.b:</i> Generate a yearly faculty survey to examine action occurring in OT education to advance mission of COTAD</p>
<p>Strategy 4.A.2: Support OT/OTA educators and administrators to identify needs and implement actions related to student recruitment and retention from historically minoritized and excluded backgrounds.</p> <p><i>Responsible:</i> Ed</p>	<p><i>Indicator 4.A.2.a:</i> Generate a yearly faculty survey to examine action occurring in OT education</p>
	<p><i>Indicator 4.A.2.b:</i> Create a minimum of one training opportunity per year that includes information and strategies related to retention</p>
	<p><i>Indicator 4.A.2.c:</i> Generate at least one resource which summarizes the latest evidence related to recruitment and retention of underrepresented OT/OTA students.</p>

Faculty Recruitment and Retention Objective 4.B: <i>Enhance representation of faculty members with minoritized backgrounds in OT/OTA education programs</i>	
<p>Strategy 4.B.1: Generate structured opportunity for faculty mentoring</p> <p><i>Responsible:</i> Ed, Practitioner Committee subcommittee: CMP</p>	<p><i>Indicator 4.B.1.a:</i> Create a mentor match opportunity for OT/OTA faculty</p> <p><i>Indicator 4.B.1.b:</i> Create one event that provides resources or training to support faculty for success.</p>
<p>Strategy 4.B.2: Generate opportunities to promote networking, engagement, and support</p> <p><i>Responsible:</i> Ed</p>	<p><i>Indicator 4.B.2.a:</i> Offer two social gatherings per year at annual AOTA events</p>
<p>Strategy 4.B.3: Support OT/OTA education programs to identify needs and implement actions to recruit and retain OT educators with minoritized backgrounds.</p> <p><i>Responsible:</i> Ed</p>	<p><i>Indicator 4.B.3.a:</i> Create a minimum of one action-oriented training opportunity per year</p>

Implementation

Responsible Party

The Board of Directors is responsible for ensuring the strategic plan is used consistently as a guide for COTAD National work and are also responsible for approving any edits or modifications to the plan as they may emerge over the 5 year timeline. The plan can be modified at the discretion of the Board of Directors through discussion.

Timeline

Implementation of the plan will begin on September 1st, 2022 and extend until August 31, 2027. By the end of year 3 of the plan (June 30th, 2025) the Board of Directors will initiate a benchmark evaluation of the progress and direction of the plan to determine whether to continue with the plan for the final 2 years or re-evaluate and modify for a new direction.