American Therapeutic Recreation Association

Strategic Plan

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# American Therapeutic Recreation Association

## Strategic Plan

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Executive Summary

The American Therapeutic Recreation Association (ATRA), a national membership organization, embarked on a Strategic Planning process beginning in December 2012. The ATRA Board of Directors (BOD) sought proposals from consultants for the development of a comprehensive Strategic Plan for 2013 – 2017, and subsequently hired Monica Gould, President of Strategic Consulting Partners to lead them through the planning process, which began on March 8, 2013.

ATRA has experienced flat membership enrollments (2,200), like other membership organizations in this market economy, despite the fact that there are 15,000 credentialed therapeutic recreation specialists in the US. ATRA expressed a desire to look at current member services in addition to legislative initiatives, services provided through treatment networks and chapter affiliates, and advocacy to external accreditation agencies (e.g., Joint Commission, Commission on Accreditation of Rehabilitation Facilities [CARF], Centers for Medicaid and Medicare [CMS], etc.), as well as the current and future trends in healthcare and social service arenas.

In an effort to evaluate ATRA’s membership satisfaction and engagement, ATRA conducted a membership survey at the start of the strategic planning process. The purpose of the ATRA Membership survey was to gather data to understand the thoughts and opinions of current, past and non-members in order to learn about ways for the organization to improve and retain membership of the organization. The survey responses are intended to be utilized by ATRA’s Board of Directors to formulate ATRA’s strategic direction over the next four to five years.

The questions were segmented based upon the membership status of the participant. There were 560 people who participated in the survey. Out of the total number of participants, 368 (65.7%) people were current members, 95 (17.0%) were past members, and 97 (17.3%) never were members.

Current member highlights:
- Generally, members were satisfied with their membership especially continuing education programs.
- More effective communication with members was identified as the biggest suggested area for improvement.
- Members indicated that ATRA needs to have a more focused and unified direction.
- Members expressed a need for more local and chapter educational opportunities.
- Members highlighted the need for increased advocacy.

Past member highlights:
- Overall satisfaction of past members was relatively neutral compared to member results.
- Continuing education was called out as the most effective service ATRA provides.
- 82% dropped their membership due to cost.

Non-member highlights:
- 61% of the non-members are still employed in the profession.
- 43% of non-members will join if the price of membership were lower.
- Non-members share their desire to belong to a professional organization and to support the profession.
Additionally, ATRA’s Board of Directors members completed a comprehensive survey evaluating ATRA’s current and future direction in a number of key areas. The survey results provided insights into ATRA’s Strengths, Weaknesses, Opportunities and Threats (S.W.O.T). The Board results indicated a need for priority focus on the following areas:

- Membership Services
- Continuing Education
- Higher Education
- Evidence-based Practice
- Vision, Mission, and Definition Statements
- Internal Operations (Staff)
- Internal Operations (Board)
- Marketing
- Public Policy and Advocacy
- International Relations
- Diversity

The Board has developed a comprehensive strategic plan that includes tactical strategies to move ATRA forward to address ATRA’s S.W.O.T. The ATRA Board of Directors approved the plan September 12, 2013 and presented it to membership October 1, 2013 at the Annual Conference in Pittsburgh, PA.

**Working Assumptions**

The strategic plan was based on several assumptions. Among these are:

1. The Board will follow *ATRA’s By-Laws, ATRA’s Policies and Procedures*, and *Robert’s Rules of Order* when conducting business surrounding the strategic plan. For example, the Board and its designees will follow these documents for approval of committees, appointment of task forces, approval of documents, etc. As such, these tasks are not included in the actual work plan as they are normal operating procedures. For cases in which a specific objective or task is not covered by the aforementioned documents, the objective or task is included in the strategic plan.

2. Dates within the strategic plan are meant to align with the typical ATRA Board timeline. March 1 represents the spring Mid-Year meeting, October 1 the Annual Conference fall meeting, and December 1 the Board’s annual budget meeting. Committee and task force annual reports are normally due to the Board at the annual conference meeting, with budget requests for the upcoming year due to the Board at the December budget meeting. The dates of March 1, October 1, and December 1 were used to provide consistency within the strategic plan from year to year, but the Board may change these dates each year to coincide with the mid-year, annual, and budget meetings.
SWOT Analysis

**Strengths**
- Only national professional organization
- Educational opportunities for members
- Federal public policy group to respond to member inquiries
- Dedicated core of members
- Dedication of members and CTRSs to the profession
- Accommodating to members
- Try hard to do what is right for memberships and the profession
- Newsletter
- Webinar capabilities
- Conferences
- ATRANet because professionals can communicate in an open forum together

**Weaknesses**
- Possibly over accommodating to small factions of ATRA
- Board and volunteers spread too thin
- Limited bench strength for leadership
- Communication to members
- Use the same words to mean different things
- Lack of active volunteers
- Limited resources
- Too small to address big advocacy and occupational issues
- ATRANet due to the lack of control and ownership ATRA has over the site
- Website
- Splintered focus; doing too much
- Lack of institutional memory
- Not all of our members are on the same bus
- Low membership versus the number of CTRS professionals
• Apathetic membership – low voter turnout
• Lack of membership engagement
• Divisive membership
• Lack of trust
• Negative perception of ATRA’s direction
• Perception membership costs too much

Opportunities

• 15,000 CTRS to potentially join
• Timing right to address advocacy issues in healthcare
• Chapter start ups
• Healthcare market reform
• Veteran’s Administration is the largest employer of CTRS’
• Returning Armed Forces service members
• Commission on Accreditation of Recreational Therapy Education (CARTE)
• Committee on Accreditation of Parks, Recreation, and Tourism (COAPRT)
• The profession is expanding internationally
• New technology – patient intervention and education
• Definition statement of practice
• Marketing and messaging about profession and ATRA
• Coalition meetings
• Marketing to schools, students, and faculty
• Requirement of field for bachelors only unlike other therapy professions, such as physical therapy and occupational therapy
• Website to serve as an advocacy and membership recruitment tool
• Evidence-based practice (EBP)

Threats

• COAPRT
• American Occupational Therapy Association
• Lack of regulations and licensure
• Decrease in legislative mandates
• Lack of standardization in education; quality of education varies
• Reduction in the number of education programs from over 200 to 86; Reduction in the number of doctoral preparation programs in the field
• National Association of Activity Professionals
• Apathy in the field
• Administrators and physicians may be unaware of opportunities for referrals
• Current CTRSs not keeping up on best practices
• External groups marketing to our members; individuals not able to distinguish professional organizations from one another
• BS level degree

Values

Before the Board began the strategic planning process, it was imperative to focus on shared values that would act as the foundation of their discussions and decisions regarding the future of ATRA. Three core values were quickly identified as central pillars for the strategic planning process. These three core values included:
• **Integrity**: To ensure that goals, decisions, and activities of the Association are consistent with ensuring the future health and robustness of the profession

• **Quality**: To strive to be excellent in providing high-quality membership services in order so that active, engaged, and informed professionals may provide evidence-based, superior services to clients

• **Growth**: To evolve the association in positive directions that sustain and strengthen the profession toward its full capacity in providing outstanding interventions to clients and in being recognized by society as a necessary, beneficial, and important

**Strategic Goal Areas**

The Board, after careful deliberation and discussion, determined the following goals areas to be important foci for the next three to five years.

• **Membership Services**: To enhance recruitment, retention, and engagement of members

• **Continuing Education**: Provide high quality educational opportunities to meet the needs of ATRA’s members

• **Higher Education**: Provide association support to educators to track and advocate for more and better programs

• **Evidence Based Practice**: Provide leadership in creating and promoting evidence-based practice (EBP)

• **Vision, Mission, and Definition Statements**: Develop vision, mission, and definition statements that reflect current practice and trends

• **Internal Operations**: Staff: Maintain adequate contractual staff to support membership needs and provide exceptional services

• **Internal Board etc**: To streamline and optimize the infrastructure of ATRA’s Board of Directors and committees

• **Marketing**: Develop, refine, and market ATRA’s brand to its various target markets

• **Public Policy and Advocacy**: Develop strategy that ensures that the profession is recognized in State and Federal regulations

• **International Relations**: Develop improved international relations with similar membership organizations

• **Diversity**: Develop, refine, and implement plan to recruit a more diverse membership and infuse them into the organization
Strategic Plan Action Strategy

Goal 1: To enhance recruitment, retention, and engagement of members.

Objective 1: Increase ATRA membership by 3% each year for the next five years (2,148 by October 1, 2014, to 2,212 by October 1, 2015, to 2,278 by October 1, 2016, to 2,347 by October 1, 2017, to 2,417 by October 1, 2018).

Significance: 
Need to increase membership numbers; deepen membership commitment; increase members’ knowledge of association; improve membership services; improve viability and visibility of association.

Resources: 
Membership Committee; Speakers to present “Benefits of ATRA” presentation; launching of new website; more committee members for Membership Committee that are non-board; Board Liaison to Membership Committee.

Tasks: (Membership Committee)
1. Develop and finalize standardized presentation of “Benefits of ATRA” by October 1, 2014. 
   a. Determine content and speakers for presentation by October 1, 2014.
   b. Seek Board approval of presentation by October 1, 2014.
   c. Submit quarterly webinars for presentation by October 1, 2014 and annually thereafter.
   d. Promote presentation/webinars to university/colleges, Chapter Affiliates, and treatment networks via web site, newsletter, News Bites, etc. each quarter.
   e. Evaluate process and develop summary report of webinars for Board by October 1, 2015 and annually thereafter.
2. Set up listservs (or comparable) on website for treatment networks, chapter affiliates, and similar groups by March 1, 2014.
3. Set up a “suggestion box” on website by March 1, 2014.
4. Develop an exit survey to distribute to those members who do not re-new their membership in the time frame outlined in the policy by October 1, 2014.
   a. Seek Board approval of exit survey by October 1, 2014.
   b. For members who do not renew their membership, the association management company will distribute exit survey 30 days after 3rd request for renewal beginning December 1, 2014.
   c. Evaluate process and develop summary report of exit survey for Board by October 1, 2015 and annually thereafter.
5. Develop a membership recognition plan by December 1, 2015.
   a. Seek Board approval for membership recognition plan by December 1, 2015.
   b. Implement membership recognition plan by December 1, 2015.
   c. Evaluate process and develop summary report of membership recognition plan for Board by October 1, 2016 and annually thereafter.
6. Develop PowerPoint/video to be posted on social media sites listing ATRA benefits by December 1, 2017.
   a. Determine content and speakers for social media sites by October 1, 2017.
   b. Seek Board approval for power point/video by October 1, 2017.
   c. Post power point/video on social media sites by December 1, 2017.
   d. Promote power point/video to university/colleges, Chapter Affiliates, and treatment networks via web site, newsletter, News Bites, etc. each quarter.
   e. Evaluate process and develop summary report of views, shares, etc., for Board by October 1, 2018 and annually thereafter.
**Risks:**
Efforts might not attract attention of members and non-members; Efforts might not result in membership increases.

**Measurement Criteria:**
1. Summary report of webinars by October 1, 2015 and annually thereafter.
2. Listserv on web site by March 1, 2014.
3. Suggestion box on web site by March 1, 2014.
4. Summary report of exit survey for Board by October 1, 2015 and annually thereafter.
5. Summary report of membership recognition plan by October 1, 2016 and annually thereafter.
6. Summary report of powerpoint video by October 1, 2017 and annually thereafter.
7. Increased membership by target numbers and dates.

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**Objective 2:** 
Recruit 10 new Lifetime Professional members annually in each of the next five years (40 by October 1, 2014, 50 by October 1, 2015, 60 by October 1, 2016, 70 by October 1, 2017, and 80 by October 1, 2018).

**Significance:**
Growth, sustainability and viability of the organization

**Resources:**
Membership Committee; association management company to track and report annually; Board Liaison to Membership Committee.

**Tasks: (Membership Committee)**
1. Develop marketing materials to recruit new Lifetime Professional members (cost savings and stability of the organization) by October 1, 2015.
   a. Determine content, target audience, additional benefits, and strategy for Lifetime Professional membership recruitment.
   b. Seek Board approval of Lifetime Professional membership materials and strategy by October 1, 2015.
   c. Contact above target members, noting benefits of Lifetime Professional membership by October 1, 2015, and annually thereafter.
   d. Market Lifetime Professional membership to all association members by October 1, 2015, and annually thereafter.
   e. Evaluate process and develop summary report for Board by October 1, 2016 and annually thereafter.
2. Association management company to provide report of Lifetime Professional members by October 1, 2016 and annually thereafter.

**Risks:**
Lifetime Professional memberships are not attractive enough to members; Growth through Lifetime Professional memberships stunted.

**Measurement:**
1. Annual report from association management company on October 1, 2016 and annually thereafter.
2. Summary report from Membership Committee on October 1, 2016 and annually thereafter.
3. Increased Lifetime Professional members by target numbers and dates.
Goal 2: Continuing Education: To provide high quality educational opportunities to meet the needs of ATRA’s members.

**Objective 1:** To evaluate the effectiveness of the CEU Pre-Approval process with NCTRC annually by December 1, 2014, December 1, 2015, and December 1, 2016.

**Significance**
It is a new program and we need to evaluate to make sure it is serving its purpose.

**Resources**
Time to develop an evaluation tool, CEU coordinator and CEU board liaison, representative from National Council for Therapeutic Recreation Certification and local or regional conference representative to develop evaluation tool, association management company.

**Tasks: (CEU Coordinator)**
1. Evaluate effectiveness of CEU Pre-Approval system by December 1, 2014, December 1, 2015, and December 1, 2016.
   a. Develop evaluation team by March 1, 2014, with CEU coordinator, board liaison, association management company, representative from NCTRC, and one conference coordinator from a local conference.
   b. Develop evaluation tool by March 1, 2014.
   c. Distribute the evaluation tool to team and others as appropriate by March 1, 2014.
   d. Tabulate results of evaluation tool by October 1, 2014 and share results with appropriate parties, including the Board as needed.
   e. Make program changes that team and Board agree on by December 1, 2014.
2. Evaluate process and develop summary report for Board by December 1, 2014, December 1, 2015, and December 1, 2016.

**Risks**
Tool is ineffective and does not accurately measure effectiveness of educational programs; Inconsistent uses of evaluation tool.

**Measurement Criteria**
1. Summary report of results of evaluation tool by December 1, 2014, December 1, 2015, and December 1, 2016.

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**Objective 2:** Create a virtual speaker’s bureau that can offer national speakers for local educational opportunities, with two topics available by March 1, 2015; four topics by March 1, 2016; six topics by March 1, 2017; eight topics by March 1, 2018.

**Significance**
Members are requesting regional, local and virtual presentations.

**Resources**
Chapter Affiliate Council (CAC) members; Board Liaison to CAC; Technology options; presenters; “standardized” presentations; training for technology.

**Tasks: (CAC)**
1. Create virtual speakers’ bureau with two new topics developed by January 1, 2015, and two new topics developed in each of the next four years.
a. Identify two topics that would enhance ATRA Chapter offerings at local conferences and can be presented effectively using remote technology by March 1, 2014 and annually thereafter.

b. Create a resource list of technology available to Chapters who wish to use the virtual speakers’ bureau to include pricing, system requirements, functionality, audio and/or visual capabilities and support for troubleshooting by October 1, 2014.

c. Create handouts regarding each of the technology options on the resource list to train speakers and conference coordinators in their use and functions by October 1, 2014.

d. Pursue speakers for identified topics with appropriate backgrounds and credentials

e. Create standardized session proposals according to the ATRA CEU Manual by October 1, 2014.

f. Communicate details of the virtual speakers’ bureau to Chapters and advertise the service in ATRA newsletter, News Bites, website, etc. by December 1, 2014 and annually thereafter.

g. Supports offerings of sessions as necessary.

h. Survey Chapters on topics to add to the virtual speakers bureau by October 1, 2015 and annually thereafter.

2. Evaluate and submit summary report to Board by October 1, 2015 and annually thereafter.

Risks
By offering to chapters, many non-ATRA-members will have access.

Measurement Criteria
1. Completed survey to Chapters about additional topics annually by October 1, 2015 and annually thereafter.
2. Completed evaluation and summary report to Board about annual progress each year by October 1 and annually thereafter.

**Objective 3:** To develop a certificate-based educational series by October 1, 2017.

Significance
Members are requesting specialty training that can also be linked to the specialty certifications from NCTRC as well as other certifications. The field is increasingly demanding evidence-based practice (EBP).

Resources
Certification Education Task Force; Successful Dementia Practice Guidelines (DPG) model; Content area experts; NCTRC; association management company; CEU Coordinator; Board Liaison to CBETF.

Tasks: (Certificate-Based Education Task Force)
1. Develop plan for certificate-based education including priority areas, content experts in each area, marketing to professionals, and specific plan for updating content as needed by March 1, 2017.
   a. Develop template agreement of exclusivity between ATRA and content experts by March 1, 2017.
   b. Seek approval from Board for agreement of exclusivity by March 1, 2017.
   c. Implement plan and begin certification-based education series by October 1, 2017.
2. Evaluate and revise certificate-based education program and develop summary report to Board by October 1, 2018.

Risks
Time and resources invested and the program is not utilized or valued by members; NCTRC specialty certification program terminated by 2017.
Measurement Criteria
1. At least one specialty training by October 1, 2017
2. Summary report of certificate-based education program by October 1, 2018.
Goal 3: Higher Education: Provide association support to track status of educational programs and advocate for more and better programs.

Objective 1: Inventory US curricula at the associate’s, bachelor’s, master’s, and doctoral levels by March 1, 2014.

Significance
Reduction in number of education programs in the US; complete inventory is unavailable; ability to measure growth or shrinkage depends on accurate inventory; Board Liaison to Higher Education Task Force.

Resources
Higher Education Task Force; Academic Affairs Committee; Authors of curriculum studies; Educators.

Tasks: (Higher Education Task Force)
1. Create inventory of professional undergraduate and graduate programs in the US.
   a. Contact authors of prior curriculum studies, NCTRC, ATRA, Internet sources etc. to develop inventory (location, types of degrees, types of instruction, accreditation status, etc.)
   b. Verify accuracy of information with program directors.
   c. Seek Board approval of inventory by March 1, 2014.
   d. Publish inventory on ATRA web page by March 1, 2014.
2. Update by March 1, 2015 and annually thereafter.

Risks
Hard to know status of programs; marketing would be impeded if results are not accurate; Difficult to keep the inventory up to date

Measurement Criteria
1. Education program inventory posted on ATRA web site by March 1, 2014.
2. Education program inventory updated annually starting March 1, 2015.

Objective 2: Develop, publish, and distribute marketing and recruitment materials to encourage entry into all levels of degree programs by March 1, 2015.

Significance
Increase awareness of degrees at all levels; Increase number of pre-professionals entering academic program; Increase number of professionals entering the field; Increase number of professionals entering graduate degree programs; Increase number of Ph.D.s for entering university careers.

Resources
Higher Education Task Force; Academic Affairs Committee; authors of curriculum studies; Educators; curriculum research; Curriculum inventory; association management company; Board Liaison to Higher Education Task Force.

Tasks: (Higher Education Task Force)
1. Create marketing and recruitment materials for undergraduate and graduate programs (e.g., social media sites, brochures, testimonials, etc.) by March 1, 2015.
   a. Review existing recruitment examples from numerous university degree programs by March 1, 2014.
b. Seek, collate, and analyze suggestions/ideas from educators across the country by March 1, 2014.
c. Develop materials pertinent to degree focus (undergraduate and graduate) and audience focus (high school to graduate students) by October 1, 2014.
d. Seek feedback on materials from educators across the country by October 1, 2014.
e. Seek Board approval for recruitment material by December 1, 2014.
f. Work with association management company to publish and distribute widely to various audiences by March 1, 2015.

2. Evaluate materials and modify as needed, with Board approval by March 1, 2016 and annually thereafter.

**Risks**
Difficult to get materials in the right hands; Difficulty matching message to audience

**Measurement Criteria**
1. Marketing and recruitment materials produced, published, and distributed by March 1, 2015.

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**Objective 3:** Sponsor a critical issues mini-forum on higher education at the Annual Conference in Oklahoma City (OKC) in October 2014.

**Resources**
Higher Education Task Force; Academic Affairs Committee; Authors of curriculum studies; Educators; association management company; Board Liaison to Higher Education Task Force.

**Tasks: (Higher Education Task Force)**
1. Sponsor critical issues mini-forum on higher education at the Annual conference in OKC in September 2014.
   a. Identify topics and format for Critical Issues mini-forum by December 1, 2013.
   b. Estimate necessary budget by December 1, 2013.
   c. Coordinate with association management company and OKC conference chairs for space and times.
   d. Coordinate with Board Liaison and association management company to market critical issues mini-forum.
   e. Coordinate critical issues mini-forum on-site at OKC September 2014.
   f. Evaluate critical issues mini-forum by December 1, 2014.
2. Coordinate with Board and association management company to distribute results of critical issues mini-forum paper by December 1, 2014.

**Risks**
Forum not well-attended; Little consensus on issues with no resolution; Further fracturing of the field

**Measurement Criteria**
2. Publication and distribution of results papers by December 1, 2014.

Resources
Higher Education Task Force; Academic Affairs Committee; Educators; association management company; Board Liaison to Higher Education Task Force.

Tasks: (Higher Education Task Force)
   a. Identify topics, format, and budget for TREC III by December 1, 2015.
   b. Coordinate with association management company for TREC III location and logistics.
   c. Coordinate with Board and association management company to market TREC III by March 1, 2016.
   d. Coordinate TREC III on-site by October 1, 2016.
   e. Evaluate TREC III by December 1, 2016.
   f. Coordinate with Board and association management company to distribute results of TREC III by December 1, 2016.
2. Provide final summary report of TREC III to Board by December 1, 2016.

Risks
TREC III not well-attended; Little consensus on issues with no resolution; Further fracturing of the field

Measurement Criteria
1. Sponsorship of TREC III by October 1, 2016.
2. Publication and distribution of final report by December 1, 2016.
Goal 4: Evidence Based Practice: Provide leadership in creating and promoting evidence-based practice (EBP).

**Objective 1:** Develop and implement a strategy for disseminating existing information about evidence-based practice by March 1, 2014.

**Significance**
Evidence-based practice is prominent in health care and other arenas; To be viable practitioners must apply evidence-based practice whenever and wherever possible; ATRA needs to be at the forefront of promoting and supporting evidence-based practice.

**Resources**
Current professional literature; Evidence-Based Practice Task Force; Board Liaison to Evidence-Based Practice Task Force.

**Tasks: (Evidence-Based Practice Task Force)**

1. Identify areas of significant literature/research support and areas of lack of literature/research support for evidence-based practice by March 1, 2014.
   a. Review related literature for the evidence base of practice focusing on most commonly used interventions, highest percentages of client populations served by the profession, etc.
   b. Determine and prioritize areas (interventions/client populations) in which greater research/literature support is needed.
   c. Select 2 – 3 areas of priority based on criteria in 1.b. above by March 1, 2014.
   d. Seek Board approval for priority areas by March 1, 2014.

2. In areas that lack literature/research support, develop a research agenda identifying gaps in research-based interventions and encouraging future EBP research by December 1, 2014.
   a. Develop strategy for developing research agenda (with membership input) by priority areas by October 1, 2014.
   b. Implement strategy for developing research agenda by December 1, 2014.
   c. Seek Board approval for final research agenda by March 1, 2015.
   d. Provide final report to Board by March 1, 2015.
   e. Disseminate research agenda to membership and universities by October 1, 2014.

**Risks**
Members not willing or able to implement EBP; Employing agencies not willing to let professionals implement EBP; Methods of dissemination are ineffective.

**Measurement Criteria**
1. Priority areas identified by March 1, 2014.
2. Board approval of priority areas by March 1, 2014.
4. Dissemination of research agenda to membership by October 1, 2014.
5. Reports from membership about infusion of evidence-based information into practice.
Objective 2: Develop a strategy for creating and disseminating information, guidelines, and protocols about evidence-based practice by October 1, 2014.

Significance
EBP is prominent in health care and other arenas; To be viable practitioners must apply EBP whenever and wherever possible; ATRA needs to be at the forefront of promoting and supporting EBP.

Resources
Current literature; Evidence-Based Practice Task Force; Board Liaison to Evidence-Based Practice Task Force.

Tasks: (Evidence-Based Practice Task Force)
1. Identify areas of significant literature/research support and areas of lack of literature/research support for evidence-based practice by March 1, 2014 (see Goal 4, Objective 1).
   a. From work in prior objective, determine areas (interventions/client populations) of greatest need that have adequate research support.
   b. Select 2 – 3 areas of priority based on criteria above, for areas that have literature/research support by March 1, 2014.
   c. Seek Board approval for priority areas by March 1, 2014.
2. In areas of significant strength, develop new guidelines/examples to assist practitioners with implementation of EBP by March 1, 2016.
   a. Develop strategy for developing guidelines/examples of priority areas.
   b. Seek Board approval for guidelines/examples by October 1, 2015.
   c. Create and evaluate guidelines/examples by October 1, 2015 and annually thereafter.
   d. Provide summary report to Board by March 1, 2016 and annually thereafter.
   e. Disseminate guidelines/examples to membership by March 1, 2016 and annually thereafter.

Risks
Members not willing to implement EBP; Employing agencies not willing to let professionals implement EBP; Methods of dissemination are ineffective.

Measurement Criteria
1. Priority areas identified by March 1, 2014.
2. Guidelines/examples by October 1, 2015.
3. Final report on guidelines/examples to Board by March 1, 2016.
4. Reports from membership about infusion of evidence-based information into practice.
Goal 5: Vision, Mission, and Definition Statements: Develop updated vision, mission, and definition statements that reflect current practice and trends.

**Objective 1:** Develop updated ATRA vision and mission statements, including seeking input from the profession by October 1, 2014.

**Significance**
Vision, mission, and definition statements guide the actions of the association and the profession; Membership.

**Resources:**
ATRA Board of Directors, association management company.

**Tasks: (ATRA Board)**
1. Identify small work group to update on vision and mission statements by December 1, 2013.
2. Review past ATRA vision and mission statements, as well as others from related fields or sources, by March 1, 2014.
3. Develop an updated statement(s) for Board review by March 1, 2014.
4. Seek membership input via News Bite or similar mechanism by October 1, 2014.
5. Seek Board approval for updated vision and mission statements by October 1, 2014.
6. Advertise updated vision and mission statements to members and various audiences by October 1, 2014.

**Risks**
Vision and mission statements do not meet the needs of the association.

**Measurement Criteria**
1. Updated ATRA vision and mission statements by October 1, 2014.

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**Objective 2:** Develop updated ATRA definition statement, including seeking input from the profession by October 1, 2014.

**Significance**
Vision, mission, and definition statements guide the actions of the association and the profession.

**Resources**
Definition Task Force; association management company; ATRA Board; Membership; Board Liaison to Definition Task Force.

**Tasks: (Definition Task Force)**
1. Review past ATRA definition statements, as well as others from related fields or sources, by March 1, 2014.
2. Develop two to three example definition statements for Board review by March 1, 2014.
3. Seek membership input on definition statements via News Bites or similar mechanism by October 1, 2014.
4. Evaluate membership response and provide summary report to Board by October 1, 2014.
5. Seek Board approval for updated definition statement by October 1, 2014.
6. Advertise updated definition statement to members and various audiences by October 1, 2014.
Risks
Updated definition statement does not meet the needs of the association.

Measurement Criteria
1. Updated ATRA definition statement by October 1, 2014.
Goal 6: Internal Operations (Staff): Maintain adequate contractual staff to support membership needs and provide exceptional service.

**Objective 1:** To identify gaps in membership services that could be met by additional contractual staff (e.g., executive director, conference coordinator) by December 1, 2014.

**Significance**
Additional staffing may be needed as ATRA grows and evolves; Staff would improve institutional memory and “face of ATRA” for members to identify with; Potential professional staff presence at meetings of national disability-related and health and human service associations in Washington, DC.

**Resources**
ATRA Board of Directors, association management company, potential paid consultant.

**Tasks: (ATRA Board)**
1. Identify small work group to identify gaps in membership services by March 1, 2014.
2. Analyze 2012 Membership Survey on perceived met and unmet needs from current members, past members, and those who are not members; to be completed by March 1, 2014.
3. Prioritize urgency of met and unmet needs “lists” identifying important gaps in service, to be completed by March 1, 2014.
4. Based on list identified in #3, develop plan of action that includes reviewing current staff assignments as well as potential hiring of part-time staff to address gaps in membership services, to be completed by March 1, 2014.
5. Seek Board approval of plan of action by October 1, 2014.
6. Implement plan developed (e.g., develop new staff position descriptions, advertise positions, hire staff, etc.) starting by December 1, 2014.
7. Evaluate and provide summary report to Board by December 1, 2015 and annually thereafter.

**Risks**
ATRA’s potential growth and evolution may be stunted without additional personnel; Overextend ATRA financially.

**Measurement Criteria**
2. New staff (if and as needed) hiring process started by December 1, 2014.
Goal 7: Internal (Board): To streamline and optimize the infrastructure of ATRA’s Board of Directors and committees.

Objective 1: To comprehensively review the structure, function, and responsibilities of the ATRA Board of Directors and its committees, chapter affiliate council, treatment networks, task forces, and potential technical experts by October 1, 2014.

Significance
Current structure, function, and responsibilities of the Board of Directors have remained largely unchanged since ATRA’s inception; Need to streamline and capitalize on efficiencies in order for ATRA to grow and evolve.

Resources
ATRA Board of Directors, legal counsel, past presidents, ATRA By-Laws; Robert’s Rules of Order; Committee and task force chairs and members.

Tasks: (ATRA Board)
1. Identify small work group to identify gaps in membership services by March 1, 2014.
3. Review (a) Strategic Plan, (b) “Gaps and Priorities Plan,” and other pertinent documents (see #1 above) to identify best organizational structure to meet the needs of the organization and lead the membership to 2017, by March 1, 2014.
4. ATRA Board of Directors develop “Board of Directors’ Structure Transitional Plan” to move from current organizational structure to new organizational structure (see #2 above), by March 1, 2014.
5. Present By-Laws revisions and other necessary changes to ATRA membership by October 1, 2014.
6. Complete transition plan into new organizational structure by December 1, 2014.
7. ATRA Board of Directors revisit structure to ensure it meets members’ and organization’s needs by December 1, 2015 and annually thereafter.

Risks
Duplication of effort and overlap that can lead to stagnation and inefficiency; “Burn out” by those actively involved making it harder to recruit new people; Current By-Laws and Policies and Procedures, being out of date or in conflict, make operating the association difficult.

Measurement Criteria
2. ATRA Board of Directors’ Structure Transitional Plan developed by March 1, 2014.
3. New By-Laws changes to membership by October 1, 2014.
4. Transition plan completed by December 1, 2014.
5. Review by December 1, 2015 and annually thereafter.
**Objective 2:** Build a mechanism to identify, recruit, and mentor the next generation of ATRA’s leaders and increase broader participation by members by October 1, 2015.

**Significance**
Additional and new leaders are needed to grow and evolve; Currently insufficient mechanism to systematically recruit and develop new leaders.

**Resources**
Past Presidents’ Council; Past Board members; Peg Connolly Scholarship winners; Recreation Therapy Foundation (RTF); Chapter Affiliate Council (CAC); Treatment Networks; Leadership ATRA; Task Forces: Diversity Committee.

**Tasks: (ATRA Board of Directors)**
1. Review current and needed mechanisms and needs for recruiting, training, and retaining new leadership talent by October 1, 2014.
2. Develop “ATRA Leadership 2017” plan with specific recommendations for identifying, recruiting, training, mentoring, developing, and retaining new leadership talent through specific channels or mechanisms, by December 1, 2014.
4. Review and update “ATRA Leadership 2017” by December 1, 2015 and annually thereafter.

**Risks**
If new leaders are not developed, the Association will stagnate.

**Measurement Criteria**
2. Recommendations implemented by March 1, 2015.
3. Summary report of “ATRA Leadership 2017” by December 1, 2015 and annually thereafter.
Goal 8: Marketing: Develop, refine, and market ATRA’s brand to its various target markets.

**Objective 1:** Develop a user friendly website that engages consumers, members and stakeholders by March 1, 2014.

**Significance**
Improved communication with members, consumers, and stakeholders.

**Resources**
Financial commitment from ATRA board for initial setup and ongoing support; Time from ATRA Board of Directors and association management company office to enter content; Professional website development company.

**Tasks: (ATRA Board of Directors)**
1. Work with contracted web development company, Wedu, in the following phases of website development: discovery, competitive analysis, site hierarchy, functional planning, creative, technology, execution and results.
2. Beta test new web site by December 1, 2013.
3. Launch new web site by March 1, 2014.
4. Advertise new web site to members by March 1, 2014.
5. Evaluate web site by March 1, 2015 and annually thereafter.

**Risks**
Not enough financial resources.

**Measurement Criteria**
1. New website launched by March 1, 2014.

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**Objective 2:** Develop comprehensive marketing materials that communicate who we are, what we do, and how we are distinct from similar professions by October 1, 2015.

**Significance**
Need for comprehensive, high-quality, and relevant marketing plan and materials for promoting the profession and for promoting ATRA.

**Resources**
Marketing vendor; financial commitment, membership input.

**Tasks (ATRA Board)**
1. Create comprehensive marketing materials by October 1, 2015.
   a. Create Request for Proposals for marketing that include specifications, duties, timelines, markets/audiences, evaluation criteria, etc. by December 1, 2014.
   b. Advertise marketing RFP widely through all known outlets.
   c. Evaluate proposals according to criteria in RFP by March 1, 2015.
   d. Contract with highest-rated vendor to create comprehensive marketing plan.
   e. Work with vendor to ensure development of timely, accurate, and professional materials, seeking membership input whenever possible.
2. Distribute materials to intended audiences by December 1, 2015 and as often as necessary.
**Risks**
Materials not reaching intended audiences.

**Measurement Criteria**
1. Materials created and distributed by December 1, 2015 and on-going.
Goal 9: Public Policy and Advocacy: Develop a strategy that ensures that the profession is recognized in State and Federal regulations.

Objective 1: Establish an effective method of communicating public policy issues to members by March 1, 2014 and evaluate annually thereafter.

Significance
Members need timely, positive and accurate information about public policy issues in language that they can understand; Critical to have member involvement with legislative issues; Critical to have member involvement with legislative issues.

Resources
Public Policy Committee; Board Liaison to Public Policy Committee.

Tasks: (Public Policy Committee)
1. Develop strategy for communicating with and engaging members in public policy issues by March 1, 2014.
   a. Determine overall content of message consistent with public policy issues.
   b. Determine best methods of communicating timely, positive, and accurate messages to members (i.e., quarterly column in Newsletter, News Bites, web site, ATRAnet, social media, etc.) by March 1, 2014.
   c. Explore creating a network of ATRA members to serve as state representatives.
   d. Seek Board of Directors’ approval for communication strategy by March 1, 2014.
2. Evaluate process and develop summary report by December 1, 2014 and annually thereafter.

Risks
Methods of communication are not effective; Members do not gain information about issues.

Measurement Criteria
2. Summary report of communication strategy effectiveness by December 1, 2014 and annually thereafter.

Objective 2: Develop two to three basic education sessions that inform members of the legislative process by March 1, 2014 and evaluate annually thereafter.

Significance
Members need timely, positive and accurate information about public policy issues in language that they can understand; Critical to have member involvement with legislative issues.

Resources
Public Policy Committee; Board Liaison to Public Policy Committee.

Tasks: (Public Policy Committee)
1. Develop two to three basic education sessions on the legislative process by March 1, 2014 (e.g., Legislation Terminology, Legislative Processes 101, Talking to Your Legislator, etc.).
   a. Develop basic content and materials for each session (e.g., power point, handouts, etc.).
   b. Pilot test each session on appropriate audience(s).
   c. Revise and finalize each session’s content and materials.
   d. Seek Board approval for each session by March 1, 2014.
Objective 3: Design a legislative leadership training course by October 1, 2015.

Significance
People need to feel comfortable in advocacy roles; New leaders need to be identified and groomed for advocacy and public policy efforts; Critical to have member involvement with legislative issues.

Resources
Public Policy Committee; Board Liaison to Public Policy Committee.

Tasks: (Public Policy Committee)
1. Develop legislative leadership training course by October 1, 2015.
   a. Define learning objectives and learning outcomes for legislative training course.
   b. Create curriculum based on learning objectives and learning outcomes.
   c. Develop necessary materials (power points, handouts, virtual training materials) for appropriate delivery.
   d. Identify, secure, and, if necessary, train presenters.
   e. Create recognition process for legislative leadership training course graduates.
   f. Seek Board approval for legislative leadership training course packet and recognition plan.
   g. Promote legislative leadership training to members, university/colleges, Chapter Affiliates, treatment networks, etc. through newsletters, News Bites, ATRA.net, web site, and other means.
   h. Evaluate and revise training as appropriate.
2. Develop summary report of legislative leadership training for Board by December 1, 2016.

Risks
Not enough members sign up for legislative leadership training course; Individuals drop out prior to completion; Graduates do not become active in legislative processes in the future.

Measurement Criteria
1. Legislative leadership training course packet and recognition plan by October 1, 2015.
2. Summary report of legislative leadership training to Board by December 1, 2016.
**Objective 4:** Maintain Joint Task Force for Recreational Therapy Licensure and Regulation, in cooperation with NCTRC by October 1, 2014 and annually thereafter.

**Significance**
To protect the public and promote the field of establishing a viable legal mandate that is recognized by all state governments and regulatory organizations.

**Resources:**
Joint Task Force, Co-Chair, NCTRC; *State Recognition Options in Therapeutic Recreation: An Educational Resource* (ATRA publication, 2003).

**Tasks: (ATRA Appointee of Joint Task Force)**
1. Review and revise the JTF strategic plan and provide summary report the ATRA Board by October 1, 2014 and annually thereafter.
2. Identify organizational representatives to serve on any ad hoc work group(s).
3. Establish technologies and strategies to promote state licensure and to provide resources broad based audience of CTRSs and state leaders. (e.g., Website, Dropbox containing central folder for resources and calendar of events, Bi-monthly conference calls or webinars to network with state licensure leaders).
4. Conduct semi-annual sessions at ATRA conferences to promote state licensure.
5. Contribute to projects that will promote state licensure and enhance the profession.
   a. Prepare background materials to educate (state and federal) legislatures and regulators about the field and the value of the CTRS credential.
   b. Respond to inquiries from legislative offices, regulators and consumers regarding the profession, certification of professionals, and preferred regulatory structure.
   c. Draft model legislation to assist individual state leaders in the preparation of licensure bills.
   d. Publish articles in organizational newsletters and *ATRA Annual* to promote the JTF’s activities.
   e. Identify and establish a network of committed state coordinators.
   f. Draft a comprehensive survey to be used by states to determine level of support for licensure and to recruit support for legislative action.
   g. Provide mailings and e-blasts to assist state leaders to communicate with CTRSs within their respective states.
   h. Maintain a database of enacted and proposed regulation.
   i. Respond to requests for official position statements from the JTF.

**Risks**
Licensure bids are not successful in states and time is wasted on the efforts.

**Measurement Criteria**
1. Number of national state coordinator calls held & number of states represented on each call.
2. Number of presentations at ATRA Mid Year and Annual Conferences & attendance at each.
3. Number of webinars presented & attendance at each.
4. Number of presentations at state and chapter conferences & attendance at each.
5. Annual reports to the ATRA Board of Directors.
Goal 10: International Relations: Develop improved international relations with similar membership organizations.

**Objective 1:** Develop inventory of international activities between the US and other countries by October 1, 2016.

**Significance**
ATRA may serve as a leader in internationally promoting the profession; Information, knowledge, and resources can be shared across borders.

**Resources:**
International Committee; international associations in other countries; Board Liaison to International Committee.

**Tasks (International Committee)**
1. Develop inventory of international activities by October 1, 2015.
   a. Develop framework for inventory.
   b. Develop strategy for surveying ATRA and international members about their activities in other countries related to the profession.
   c. Implement strategy by March 1, 2015.
   d. Finalize inventory for public consumption.
   e. Seek Board approval for posting on ATRA web site by March 1, 2016.
2. Revise as necessary and update by October 1, 2017 and annually thereafter.

**Risks**
Individuals will not provide information on international activities; Inventory become outdated.

**Measurement Criteria**
1. Finalized inventory to Board by March 1, 2015.
2. International inventory updated by October 1, 2017 and annually thereafter.

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**Objective 2:** Develop improved methods of communication between the US and other identified countries by December 1, 2017.

**Significance**
ATRA may serve as a leader in internationally promoting the profession; Information, knowledge, and resources can be shared across borders.

**Resources**
International Committee; international associations in other countries; Board Liaison to International Committee.

**Tasks: (International Committee)**
1. Use international activity inventory to develop partners in each interested country.
2. Determine strategy for communicating with international partners (e.g., preference of terminology, types of communication, time frames, types of information to the shared, etc.) by October 1, 2017.
3. Seek Board approval for strategy by October 1, 2017.
5. Evaluate and revise strategy as appropriate.
6. Develop summary report of international communication for Board by October 1, 2018 and annually thereafter.

**Risks**
Individuals from other countries will not be interested in establishing linkages; Communication among multiple countries will be difficult to maintain and keep current; Language and terminology barriers.

**Measurement Criteria**
1. International communication strategy to Board by October 1, 2017.
2. Summary report of international communication to Board by October 1, 2018 and annually thereafter.

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**Objective 3: Develop international forum at ATRA Annual conference by December 1, 2015.**

**Significance**
ATRA may serve as a leader in internationally promoting the profession; Information, knowledge, and resources can be shared across borders.

**Resources**
International Committee; international associations in other countries; Board Liaison to International Committee.

**Tasks: (International Committee)**
1. Sponsor international mini-forum on international issues at the Annual conference in September/October 2015.
   a. Identify chair(s), topics, and format for International forum by December 1, 2014.
   b. Estimate necessary budget by December 1, 2014.
   c. Coordinate with association management company and Annual conference chairs for space and times by March 1, 2015.
   d. Coordinate with Board Liaison and association management company to market international forum March 1, 2015.
   e. Coordinate international forum on-site at Annual conference September 2015.
   f. Evaluate international forum by December 1, 2015.
2. Develop summary report of international forum by December 1, 2015.

**Risks**
Individuals from other countries may not be interested in or have the resources to attend the forum; Attendance by ATRA members might be low.

**Measurement Criteria**
1. Summary report to Board on international forum by December 1, 2015.
Goal 11: Diversity: Develop, refine, and implement plan to recruit a more diverse membership and infuse them into the organization.

Objective 1: Develop strategy for recruiting a more diverse population into pre-professional and graduate programs by October 1, 2017.

Significance
ATRA’s membership and leadership would benefit from additional diversity; ATRA membership and leadership is not in alignment with national diversity statistics; ATRA’s efforts to improve diversity in the past have not been successful in the long-term.

Resources
Diversity Committee; Higher Education Task Force; Board Liaison to Diversity Committee.

Tasks: (Diversity Committee)
1. Develop strategy for improving diversity in pre-professional and graduate programs by October 1, 2017.
   a. Recruit individuals from diverse backgrounds across the country to be members of Diversity Committee.
   b. Define objectives of initiative, embracing a broad definition of diversity (e.g., including persons of color, persons of different sexual orientations and identities, persons with disabilities, sex, etc).
   c. Develop and document framework (activities, timelines, marketing, and persons responsible) for implementing the strategy by March 1, 2017.
   d. Seek Board of Directors approval of diversity strategy by March 1, 2017.
   e. Implement strategy by October 1, 2107.
   f. Evaluate and revise strategy by October 1, 2018 and annually thereafter.
2. Develop summary report for Board of Directors by October 1, 2018 and annually thereafter.

Risks
Some individuals in some groups may not want to be openly identified; Message(s) will not be absorbed; Increased diversity of pre-professional and graduate programs will not occur; ATRA membership and leadership will not become more diverse.

Measurement Criteria
2. Summary report for Board of Directors by October 1, 2018.
3. Increased diversity in pre-professional and graduate educational programs.

Objective 2: Develop strategy for actively engaging a more diverse population into ATRA activities and committees by October 1, 2017.

Significance
ATRA’s membership and leadership would benefit from additional diversity; ATRA membership and leadership is not in alignment with national diversity statistics; ATRA’s efforts to improve diversity in the past have not been successful in the long-term.

Resources
Diversity Committee; Board Liaison to Diversity Committee.
Tasks: (Diversity Committee)
1. Develop strategy for improving diversity in ATRA activities and committees by October 1, 2017.
   a. Recruit individuals from diverse backgrounds across the country to be members of Diversity Committee.
   b. Define objectives of initiative, embracing a broad definition of diversity (e.g., including persons of color, persons of different sexual orientations and identities, persons with disabilities, sex, etc).
   c. Develop and document framework (activities, timelines, marketing, and persons responsible) for implementing the strategy by October 1, 2017.
   d. Seek Board approval of diversity strategy by October 1, 2017.
   e. Implement strategy by December 1, 2017.
2. Evaluate and develop summary report for Board by October 1, 2018 and annually thereafter.

Risks
Some individuals in some groups may not want to be openly identified; Message(s) will not be absorbed; Increased diversity of ATRA activities and committees will not occur; ATRA membership and leadership will not become more diverse.

Measurement Criteria
2. Summary report for Board of Directors by October 1, 2018 and annually thereafter.
3. Increased diversity in ATRA activities and committees.