

## TOTA 2026–2029 Strategic Plan

WHY: Advancing Occupational Therapy, Empowering Practitioners, and Enhancing Lives Across Texas

### Strategic Area I: Serve the Membership

Strategic Area	Long-Term Goal (2026–2029)
Serve the Membership	1. By 2029, TOTA will strengthen member engagement and professional advancement by providing high-quality continuing education, networking, and mentorship opportunities that address the evolving needs of occupational therapy practitioners, including burnout prevention, productivity, hands-on skill development, and advancement of practice.
	2. By 2029, TOTA will strengthen member engagement and recruitment through transparent and intentional communication that clearly demonstrates the value of TOTA and reflects the needs of its diverse member constituencies.
	3. By 2029, TOTA will foster a vibrant professional community by recognizing and honoring group and individual contributions through engagement initiatives, awards, and other recognition efforts,

	thereby strengthening member loyalty and participation in the profession.
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Associated LTG	2026 Prioritized Goal	Action Step (How)	Person Responsible	Target Due Date	Results / Updates
1	Provide 5 experiential learning (advanced) continuing education events per year throughout the state.	Update the CEU SOP and CEU approval process for district and statewide events	District / State Education Chair in collaboration with TOTA CEU Coordinator	12/1/26	
		Identify a potential course to offer and the associated speaker	District Chair/District Education Committee	March 31, 2026	
		Contact individual/agency on availability, cost, number of participants, etc...	District Chair/District Education Committee	April 15th, 2026	
		Identify and secure date/time/location /format of CE delivery	District Chair/District Education Committee	June 2026	
		Complete CE approval process (start advertising after CE approved)	District Education Committee Member	July 2026	

		As needed, work with speakers to encourage more experiential learning and advanced practice CEs.	State/District Education Committee member	PRN	
		Host event	District Chair	December 2026	
2	Inaugural OTA conference for 2027; Planning in 2026	Board Approval of Proposal	OTA State Representative	March 2026	
		Identify Course offerings and individuals	OTA State Rep and Committee	November 2026	
3	Special interest group implementation to foster networking, share EBPs, and advance specialized practice areas	Draft standards of practice; Board approval; Launch to TOTA community; Process management	Development Chair	July 2026 - present to the board October 2026 - launch to TOTA community Ongoing - continued management	
4	Develop and implement a clear value-of-membership communication strategy that articulates the benefits of TOTA and delivers tailored messaging to practitioners across all career stages.	Create a "This is How TOTA benefits the practice of OT" feature in Revista or on social media	Executive Director, President, Membership Chair	December 2026	
5	Each district will host at least one in-person event	Identify the type of event the district wants to host	District Chair/Membership or Development Committee	March 31, 2026	

	(CE, networking, and/or professional development).	Contact individual/agency on location, hosting logistics	District Chair/Membership or Development Committee	April 15th, 2026	
		Set date, venue logistics, advertise on TOTA/social, etc.	District Chair/Membership or Development Committee	May 15, 2026	
		Host event	District Chair/Membership or Development Committee	December 31, 2026	
6	Expand engagement with OT and OTA student organizations by increasing the number of SOTA clubs connected to the TOTA website and digital network from 17 to at least 30 participating programs.	Contact chairs of OT/OTA programs OR SOTA liaisons to encourage participation	State student reps	March 31, 2026	
		Chairs/SOTA liaison provide link to TOTA for upload	OT/OTA Student representatives, in collaboration with the district chair	July 30,, 2026	
		Request SOTA link be added to the list. Please email membership@tota.org.	State student reps	December 31, 2026	
7	Develop and implement a new student recognition award category for the TOTA Conference, including updates to award	Establish award categories and guidelines for the newly-established student award(s) for 2027.	Awards Committee and State Student Reps	October 2026	

	criteria, nomination processes, and relevant written materials and standard operating procedures (SOPs), to enhance student engagement in the awards program.	Advertise on TOTA platforms	Awards Committee	Feb 2027	
		Contact chairs of OT/OTA programs and/or SOTA liaisons to encourage participation	District chairs and State Student Reps	March 2027	

**Strategic Area II: Serve the Profession and the Consumer It Serves**

Strategic Area	Long-Term Goal (2026–2029)
Serve the Profession and the Consumer It Serves	1. By 2029, TOTA will increase public awareness and understanding of occupational therapy through coordinated community outreach led by its districts, including participation in events such as Relay for Life, Special Olympics, and local health fairs, aligned with populations served by occupational therapy.
	2. By 2029, TOTA and district representatives will strengthen relationships with OT and OTA academic programs across Texas through ongoing interaction and exchange of information to support professional connections and collaboration.
	3. By 2029, TOTA and its districts will strengthen relationships with OTP employers and workplaces across Texas through ongoing engagement to promote the value of occupational therapy and identify opportunities to support practice needs.
	4. By 2029, TOTA will develop and implement a professional mentorship program that supports

	members across career stages and expands opportunities for professional growth and leadership development.
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Associated LTG	2026 Prioritized Goal	Action Step (How)	Person Responsible	Target Due Date	Results / Updates
1	Each district will coordinate participation in at least 1 community event to promote awareness, provide education, and demonstrate the impact of OT services.	Identify & schedule a relevant community event	District chair as delegated to a district committee member (e.g., education or development rep)	May 2026	
		Advertise & recruit participation in the event.		1 month prior to the event	
		Evaluate success by number of participants and informal feedback.		1 week post event	
2	TOTA and district representatives will interact with at least 50% of OT/OTA academic programs to exchange information and develop professional connections.	Contact & schedule visits	TOTA executive director  Suggested update <i>District representative</i>	April 2026	
		Contact 1 or more academic programs to facilitate a collaborative district-level activity	District chair as delegated to district education chair	August 2026	
3	Each district will visit with at least 3 OTP employers/workplace in order promote the value	Identify & contact 3 priority workplaces to schedule visit, listening session,	District chair or as delegated a district committee member	May 2026; August 2026; November 2026	

	of TOTA and the profession and identify possible ways to support practice needs.	or inservice opportunity			
		Plan strategy and prepare materials for the visit		1 month prior to visit	
		Follow-up with sites visited regarding identified needs		1 week post visit	
4	Develop the infrastructure for a professional mentorship program.	Charge a workgroup to conduct an implementation analysis for determining next steps in advancing a mentorship program (i.e., adapt existing plan or develop new approach)	Mentorship ad hoc committee	July 2026	
		Finalize a mentorship program plan and prepare for launch		October 2026	

**Strategic Area III: Maintain a Viable Organization**

Strategic Area	Long-Term Goal (2026–2029)
Maintain a Viable Organization	1. By 2029, TOTA will increase the visibility of the organization by helping members, practitioners, and stakeholders understand who TOTA is, what

	<p>the organization does, and why it is important to the profession.</p>
	<p>2. By 2029, TOTA will strengthen communication strategies to expand collaboration and relationships with organizational members and stakeholders.</p>
	<p>3. By 2029, TOTA will establish collaborative relationships with organizations that offer specialty certifications (e.g., CBIS, CHT, CDRS, Low Vision) to support members in pursuing advanced practice and specialty credentials.</p>
	<p>4. By 2029, TOTA will cultivate and maintain a diverse volunteer leadership pipeline that supports board service and organizational roles, ensuring leadership continuity and sustained engagement across the association.</p>
	<p>5. By 2029, TOTA will increase practitioner membership by at least 10%, strengthening the organization's sustainability and impact across the profession.</p>
	<p>6. By 2029, TOTA will ensure effective organizational staffing and leadership continuity through regular review of personnel roles, job descriptions, and staffing needs to support the</p>

	mission and strategic priorities of the organization.
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Associated LTG	2026 Prioritized Goal	Action Step (How)	Person Responsible	Target Due Date	Results / Updates
1.	Enhancing Communication  Enhance TOTA's communication infrastructure by reviewing and strengthening the organization's communication strategies, channels, and messaging to improve engagement with members, practitioners, and organizational members.	Determine sustainable communication channels for reaching OT and OTA practitioners across Texas to support TOTA outreach and engagement efforts.	President and Membership chair	July 2026	
		Review and enhance TOTA's outreach email campaign to non-members and establish a structured communication schedule with at least two targeted outreach communications annually.	Executive Director, Membership Committee Chair	Ongoing	
		Distribute email campaign to include TOTA	Executive Director	Jan 2026; April 2026; July 2026;	

		website and social media pages		November 2026 (Quarterly)	
2 & 3	Develop collaborative relationships with organizations that offer specialty certifications (e.g., CBIS, CHT, CDRS, Low Vision, CKTP) to expand professional advancement opportunities for TOTA members.	Identify 5 certifications that are the most desirable to OTs (Pediatrics & Adults combined);	Committee of Development / Vice President	July 2026	
		Initiate collaboration with governing bodies of the identified certifications to explore opportunities, educational resources, and pathways for TOTA members.		Sept 2026	

		C. Promote specialty certification pathways and related career opportunities to TOTA members and non-members through TOTA communication channels and professional relationships.		December 2026	
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4	Expand and strengthen TOTA's volunteer leadership pipeline by increasing awareness, recruitment, and participation through the volunteer portal and other engagement initiatives.	Update the TOTA volunteer webpage and interest form to capture more detailed information about members' interests, skills, and availability, and allow members to request updates to their volunteer preferences	Membership Chair & District Chair	June 2026/portal review	
				August 2026 / website update suggestion	

		Develop and implement a volunteer recognition program to acknowledge and celebrate member contributions to TOTA leadership and service.		December 2026/recognition program.	
5	Establish a district-based membership growth strategy that assigns numeric recruitment targets to each district and tracks progress quarterly to support the organization-wide practitioner membership goal.	Review current membership numbers by district to establish a baseline and determine realistic district-level growth targets	District Chair & District Board & Membership Chair	November 2026	

				March 2026	
		Assign each district a numeric recruitment goal that contributes to achieving the organization-wide practitioner membership increase.		April 2026	
		Develop and distribute membership recruitment tools and messaging to support district outreach efforts.		July 2026	

		Track district membership progress quarterly and share updates with district leaders and the Board to ensure accountability and alignment with the overall goal.		November 2026	
6	Ensure leadership and personnel continuity through the formation of an ad hoc Executive Committee responsible for assessing personnel needs and leading the recruitment and selection process for open positions.	Create a search committee authorized by the Board to assess personnel needs, oversee recruitment, advertise the position, and guide the selection of any positions.	Personnel Committee & Executive Director with Support from BOD Committee	March 2026	
		The ad hoc committee will review current personnel responsibilities, organizational needs, to confirm expectations for existing position.		April 2026	

		Update and finalize the job descriptions, qualifications, and scope of responsibilities based on the personnel needs assessment.		May 2026	
		Submit updated job descriptions and recommendations to the Board for review and report-out.		June 2026	

**Strategic Area IV: Be Proactive to Internal and External Influences**

Strategic Area	Long-Term Goal (2026–2029)
Be Proactive to Internal and External Influences	1) By 2029, TOTA will demonstrate full organizational readiness for the Texas Sunset review process through strengthened advocacy practices, member engagement, and clear messaging throughout online and digital resources.
	2) By 2029 TOTA will ensure clear recognition and alignment of occupational therapy’s scope of practice in Texas, including medication management, through proactive stakeholder education and by strengthened interprofessional and organizational membership collaboration.
	3) By 2029, TOTA will proactively monitor legislation and state policy issues and respond to evolving payment and reimbursement structures to protect and

	advance occupational therapy practice across all settings.
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Associated LTG	2026 Prioritized Goal	Action Step (How)	Person Responsible	Target Due Date	Results / Updates
1	Conduct a comprehensive OT Practice Act needs assessment.	Appoint an Adhoc Committee	President	3/28/26	
		Report on Sunset Process	Adhoc Committee Chair	7/1/26	
		Comparative Review of Peer states undergone sunset review	Adhoc Committee Chair	11/1/26	
			Standards and Practice Chair	11/1/26	
		Create presentations to educate practitioners and students on Sunset Process to inform members and recommend potential marketing campaigns.	Adhoc Committee Chair	11/1/26	
2	To be addressed in 2027				
3	TOTA will establish a legislative agenda for the 90th legislative session.	Meet with lobbyists and draft legislative agenda 2027.	President Executive Director S & P L & PA	6/1/2026	
		Report on drafted priorities for 90th legislative session.	L & PA	7/1/2026	
		Final Priorities for 90th Session.	L & PA	10/1/2026	

3	Day at the Capitol	Review Operating Procedure	L & PA	6/1/2026	
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