For an organization to set its own course, its members and leaders must clearly articulate its mission and long-range goals. For an organization to follow its charted course and still be responsive to environmental change and opportunity, it must identify shorter term strategic goals (Isenberg, 1987). Strategic goals can be woven into a clear, simple plan for organizational actions, or they can be stated as those things that can be accomplished within a limited period and contribute to fulfillment of the long-range goals (Drucker, 1988). For an organization to achieve its strategic and long-range visions, the plan for action needs not only to include the expectations for accomplishment, but also to identify the human and financial resources required to complete the task. Hence, an integrated process for long-range and strategic planning that includes specific responsibilities and allocation of organizational resources will keep the organization on course and yet be flexible enough to respond to environmental or internal opportunities or threats.

In the voluntary section of AOTA, the vice-president is responsible for coordinating organizational planning. The vice-president serves as chair of the Representative Assembly’s Long-Range Plan committee. The planning role was assigned to the vice-president in the 1970s, during the reorganization of the Association. It has become the major function of the office, which also carries the traditional responsibility for the vice-president to serve as chief executive officer in the absence of the president of the Association. The vice-president’s role in the planning process has evolved along with the process itself. To gain perspective on the current state of planning in AOTA, I will review the evolution and purpose of long-range and strategic planning. To look toward the future, the strategic goals for 1987 to 1990 are presented. Keep in mind that the long-range goals set the course and organize the ongoing operations of the organization. The strategic goals identify the immediate actions required by the organization. Both documents direct the annual allocations of resources. The strategic plan is a more flexible document, with goals being deleted as they are accomplished and new goals being included as needed.

History of Planning

The current Long Range Plan (LRP) of the Association was originally developed in the 1970s and has been periodically revised by adding or eliminating goals. The LRP consists of five mission statements and varying numbers of goal statements. The mission statements emphasize such Association purposes as providing opportunities for the expression of member concerns, anticipating emerging issues, facilitating decision making, supporting development of research and knowledge bases, supporting an educational system for occupational therapy, promoting occupational therapy as a viable health profession, and facilitating development of a relationship with consumers. The long range plan is considered a general reference document, comprehensive in scope and direction, valuable for guiding ongoing functions of the organization, and the basis for strategic planning.

Strategic planning in AOTA began with the development of the Strategic Integrated Management System (SIMS) in the early 1980s. This system identifies specific issues facing the Association in its current environment and proposes planning objectives for addressing these issues. The issues include competition in health care service delivery, changing payment systems, inadequate manpower supply, validation of theory and practice through research, integration of member needs and Association operations, escalation in skills/knowledge, demand for quality care
and cost/treatment effectiveness, new federalism shift in political/legal base for health care, and increased demand for management skills. The planning objectives for each issue are considered time limited and reflect environmental conditions. Objectives are deleted as they are accomplished.

Current State of Planning

Strategic planning for 1988-1989 incorporated a process proposed by Hoerl Associates, an organizational consultation firm in Denver, Colorado. The approach is similar to SIMS but simplifies the process and identifies a specific time for completing goals and a specific individual or component of the organization responsible for overseeing completion.

The Executive Board and representatives from major components of the organization participated in the planning process last spring with Dr. Hoerl. From that session, the group created a strategic plan for 1987 to 1990 and an operational plan for 1988 to 1989. The operational plan identifies 1-year activities that are part of the actions required to achieve strategic goals. This year, the operational goals, along with the long-range goals, were used in preparing the 1988-1989 budget packet. The goals and the budget will be presented to the Representative Assembly at its 1988 meeting.

The strategic plan begins with the following mission statement:

It is the mission of the American Occupational Therapy Association to assure the public that occupational therapy is a valuable and cost-effective service which enables productive living for its consumers. The Association serves its members by promoting the public acceptance of occupational therapy.

Strategic Plan

I. Communication and Information Management

By 1990, electronic communication will be available to all members. It will include a bibliographic system, telecommunications system, computerized resource bank, and other relevant applications.

II. Organizational Structure and Function

A. By June 1989, there will be a plan implemented for congruency between current organizational communication and organizational structure which optimizes effective and timely decision making.

B. By June 1990, there will be a study and report to determine whether decentralizing national office operations is feasible and desirable.

C. By December 1988, the AOTA, AOTF, and AOTCB presidents will delineate responsibilities for appropriate interagency activities.

III. Public Acceptance of Occupational Therapy

A. By 1995, there will be a 25% increase in name recognition of occupational therapy over 1989 baseline data among targeted groups.

B. By 1990, there will be a program in place that provides occupational therapists with the knowledge, skills, and attitudes required to decrease the difficulty occupational therapists experience in receiving payment for services in all states and territories.

IV. Practice

A. By June 1990, there will be in place a system for recognition of advanced competency in at least one area of practice, and by 1991, there will be a plan developed for recognition of advanced competency in other areas of practice.

B. By 1990, there will be a statement that differentiates professional from technical practice, particularly in the context of levels of supervision.

V. Education

A. By 1989, a study which examines current trends and issues in programmatic accreditation and AOTA's continuing involvement with accreditation will be completed.

B. By 1990, occupational therapy educators will have a formal body within the Association, such as a special interest section, to enhance instruction, curriculum, and educational research.

C. By 1993, there will be a statement of knowledge, skills, and attitudes that accurately reflects the occupational therapy theories, research, and practice components encompassing professional and technical entry level practice.

D. By 1995, reduce the gap between demand for services and the supply of practitioners so that there is a 50% increase in the number of active practitioners in the field and services are more readily available to those needing them.

E. By 1995, all recommendations from Directions for the Future will be either completed, in process, or determined not to be feasible.

VI. Research

By 1990, while continuing to support research through member contributions and contractual arrangements with AOTF, AOTA will cease funding the direct personnel component of the current AOTA/AOTF contract and support AOTF efforts to become increasingly self-supporting.

VII. Revenue Generation

By June 1989, there will be a plan for maintaining membership fee revenues at their maximum level and increasing non-fee revenues, so that by 1995, non-fee revenues will constitute at least 55% of all Association revenues.

Each strategic goal has a number of associated operational goals that relate to the 1988-1989 budget and that are assigned to individuals in the voluntary sector or on the National Office staff. Each goal will be reviewed quarterly and the strategic plan will be reviewed and revised annually.

The current strategic planning process began in the interest of developing an interactive management tool for the Executive Board and the National Office and to create a stronger link among planning, budgeting, and accountability. The goals reflect actions already taken by the Assembly and referred for management by the Board and/or issues identified by the Association's leaders as imperative for our focus on the future. Other components of the organization may adopt a similar process for planning that can potentially create a network of interrelated but individual plans for achieving AOTA's mission.

The proposed integrated process for planning will begin annually at conference with members, through the Representative Assembly and the Committee of State Association Presidents, identifying environmental trends and reviewing the mission statement. Using the information and actions from conference meetings, the Executive Board and representatives from major components of the organization can develop the strategic plan for 1988 to 1991 and the 1989-1990 operational plan and make them available so that each component of the organization can propose activities relevant to the objectives and prepare budgets required to implement the plan in 1989-1990. Review of the plans and associated budget comes full circle to the Representative Assembly for adoption in 1989.
For AOTA, long-range and strategic planning have evolved through a series of approaches and processes. Each approach has built on the previous one and considered the changing environment and nature of the organization. Long-range planning continues to play an important part in directing our ongoing organizational purpose. Strategic planning facilitates management of action around immediate issues and flexibility to deal with the unexpected or emerging trends. Both approaches to planning are vital for an organization focusing on the future.

References
Drucker, P. (1988, January-February). The coming of the new organization. HBR