

04.11.18 SSO:USA Strategic Plan, Review of Progress (*italics report completion or progress toward completion*)

Goal 1. By 2009, SSO:USA will operate through an effective, stable, and fiscally sound organizational structure clearly focused on its stated mission, vision, and objectives.			
Two Year Goal	Activities	Implementers	Measures

<p><i>Management Structures</i></p> <p>1.1. Committees have SOPs, including processes for annual evaluation and improvement, transition, and communication.</p> <p>1.2. Board has processes in place for communication, minutes, strategic planning, annual evaluation and improvement of Board activities, and transition.</p>	<p>Committees draft and submit SOPS to Board for approval. Committees use, evaluate, and improve all SOP processes.</p> <p>Board creates and documents processes. Board uses, evaluates, and improves processes.</p>	<p>All Committees, Board</p> <p>All Committees</p> <p>Board</p> <p>Board</p>	<p>Approved SOPs by end of 2004.</p> <p><i>Legal and Communications approved.</i></p> <p>Revised SOPs by end of 2005. Documents reflecting processes in place by end of 2004.</p> <p><i>All processes in place except annual evaluation of Board activities.</i></p> <p>Documents revised following evaluation by end of 2005.</p>
<p><i>Legal</i></p> <p>1.3. Implement a system for electronic voting of members in elections.</p> <p>1.4. Create a process for nominations and proposing bylaws revisions.</p> <p>1.5. Secure liability insurance for the Society.</p> <p>1.6. Bylaws, minutes, and other governance documents are accessible to the public.</p>	<p>System developed and proposed to Board. System implementation.</p> <p>Bylaws process proposed to the Board. Bylaws process implemented. Insurance secured.</p> <p>Plan for document access proposed to Board. Documents accessible.</p>	<p>Legal, Communications, Board</p> <p>Legal, Communications</p> <p>Legal, Communications, Board</p> <p>Legal, Communications</p> <p>Legal</p> <p>Legal, Communications</p> <p>Legal, Communications</p>	<p>Proposal approved by 8/04. <i>Status?</i></p> <p>System implemented by 8/05. Proposal approved by 8/04. <i>Status?</i></p> <p>System implemented by 8/05. <i>Insurance secured by 5/04.</i></p> <p>Plan approved by 8/04. <i>Status?</i></p> <p>Documents accessible by 8/05.</p>
<p><i>Financial</i></p> <p>1.7. An annual budget and financial plan, based on strategic goals, is implemented.</p> <p>1.8. Develop and implement a system to manage/report/audit</p>	<p>First annual budget proposed and approved by Board. Financial plan proposed and approved by Board. Finance system implemented. Tax returns submitted as required.</p>	<p>Treasurer, Board</p> <p>Treasurer, Board</p> <p>Treasurer</p> <p>Treasurer</p>	<p>Approved by 5/04. <i>Approved?</i></p> <p>Approved by 8/04. <i>Awaiting approval?</i></p> <p><i>System implemented by 8/04. Tax returns submitted by deadlines.</i></p>

finances. 1.9. Organization is fiscally viable. 1.10. Ruth Zemke Lecture tape sales ongoing.	Plan for lecture tape sales approved by Board. Lecture tape sales initiated.	Chair, Board Board Appointee	<i>Balanced budget and annual review by Board by 8/04. Lecture tape sales begin by 10/04.</i>
<i>Membership</i> 1.11. Develop and initiate a membership plan, to include membership structure, renewal process, recruitment, and an annual survey of member needs and satisfaction. 1.12. Initiate discussion by membership of degree to which SSO:USA should increase interdisciplinary membership. 1.13. Develop and initiate timely and effective communication to members.*	Propose membership plan to Board for approval. Initiate membership plan. Survey results reported and recommendations derived. Discussion at conference. Communications Plan with 2 year and 5 year goals proposed to Board for approval. First year communications activities initiated.	Communications, Board Communications Research, Board Board Communications, Board Communications	<i>Present to Board 8/04. Plan approved by 9/04. Plan implemented by 11/04. Membership will reach 125 members by 2006. Members rate SSO:USA member benefits and supports as highly satisfactory. Discussion 10/04. Communications Plan approved by 8/04. First year activities initiated by 9/04. Status?</i>
Goal 2. Through 2009, SSO:USA will offer an annual conference that is financially self-sustaining, provides consistently high quality occupational science papers, facilitates the research careers of attendees, and has as its hallmark an appealing balance of occupational experiences.			
Two Year Goal	Activities	Implementers	Measures

<p><i>Primary Research Papers</i></p> <p>2.1. Primary research papers are of high quality, address topics central to SSO mission, and generate discussion considered by both presenters and audience to be active and thought provoking.</p> <p>2.2. Develop plan for establishing desired topical spread of primary research papers.</p> <p>2.3. Baseline estimation of the number of SSO presentations going on to be published is established.</p>	<p>Develop plan for topical spread of conference papers. Abstract review and acceptance meets preferred distribution. <i>Status?</i> Survey of attendees.</p> <p>Plan proposed to Board for approval.</p> <p>Plan for estimating number of conference papers going on for publication developed. Baseline estimate completed.</p>	<p>Conference, Board</p> <p>Conference</p> <p>Conference</p> <p>Conference</p> <p>Research, Conference</p> <p>Research, Conference</p>	<p>Presentations rated as high quality and generative of discussion by attendees and presenters. <i>2004 results?</i> Acceptance to present becomes more competitive, as reflected by decreasing percentage of acceptance. <i>Percentages of acceptance?</i> <i>Reconsider measure?</i> Plan approved by Board by 3/05. Estimation of baseline numbers of conference papers going on to publication completed by 4/05.</p>
<p><i>Events Beyond Primary Research Papers</i></p> <p>2.4. The Ruth Zemke Lecture in Occupational Science is offered annually and rated highly by attendees.</p> <p>2.5. Scholarly events beyond primary research papers are of high quality and reflect SSO mission.</p>	<p>Lecturer selection process proposed and approved by Board. Lecture selected prior to previous conference. Lecture occurs annually. Survey of attendees. Survey of attendees.</p>	<p>Conference, Board</p> <p>Conference</p> <p>Conference</p> <p>Conference</p>	<p><i>Lecturer selection process approved by 5/04.</i> Lecturer selected and announced at conference. <i>Met for 2004.</i> Lecture occurs annually. <i>Met 2004.</i> Lecture highly rated by attendees. <i>Do we have these results?</i> Scholarly events beyond primary research papers are rated highly by attendees. <i>Results?</i></p>

<p><i>Member Careers Enhanced by Conference</i></p> <p>2.6. Research careers of attendees are enhanced through opportunities to network, collaborate, and be mentored.</p> <p>2.7. Ways in which annual conference might support member opportunities to publish are explored.</p> <p>2.8. Conference creates scholarly community through social events, traditions, and contacts.</p>	<p>Plan for providing and continually improving opportunities to network, collaborate, and be mentored is created and provided to Board for input.</p> <p>Adequacy of opportunities to network, collaborate, and be mentored is assessed through survey of attendees.</p> <p>Recommendations for improvement of opportunities to network, collaborate, and be mentored are derived from survey.</p> <p>Listing of potential ways in which member publications might be supported through conference is provided to the Board.</p> <p>Social events, traditions, and contact opportunities planned into conference program.</p> <p>Adequacy of social events, traditions, and contact opportunities in creating scholarly community assessed through survey of attendees.</p>	<p>Conference, Research, Board</p> <p>Research, Conference</p> <p>Research, Conference</p> <p>Research, Conference, Board</p> <p>Conference, Research</p> <p>Conference, Research</p>	<p>Plan approved by Board by 3/05.</p> <p>Attendees rate conference opportunities to network, collaborate, and be mentored as highly effective.</p> <p>Listing to Board for consideration by 5/06.</p> <p>Attendees rate conference creation of scholarly community through social events, traditions, and contacts as highly effective.</p> <p><i>Results?</i></p>
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<p>2.9. A plan for formal recognitions and awards at conference to acknowledge outstanding contributions to occupational science is developed.</p> <p>2.10. Members' research funding is informed through conference.</p>	<p>Recommendations for improvement of social events, traditions, and contact opportunities in creating scholarly community are derived from survey.</p> <p>Plan for recognitions and awards developed for Board approval.</p> <p>Plan for making opportunities for funding known to attendees is created.</p> <p>Plan is implemented in 2005.</p>	<p>Conference, Research</p> <p>Board, Membership</p> <p>Research</p>	<p>Plan for awards and recognitions approved by Board by 8/06.</p> <p>Funding opportunities shared at conference in 2005. Members' rate research funding opportunities made known to members through conference as highly useful.</p>
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<p><i>Quality of Balance</i></p> <p>2.11. The balance of scheduled and unscheduled time in conference program creates a restorative and reflective experience for attendees.</p> <p>2.12. Balance activities are enjoyable, offer unique perspectives on occupation, and are a significant positive feature of the conference.</p> <p>2.13. Setting is comfortable, reasonably priced, aesthetically pleasing, and provides appropriate supports for research presentations.</p>	<p>Program planning. Survey of attendees.</p> <p>Site selection. Program planning. Survey of attendees.</p> <p>Site selection. Survey of attendees.</p>	<p>Conference</p> <p>Conference</p> <p>Conference</p>	<p>Attendees rate the balance of scheduled and unscheduled time in conference program as highly effective in creating a restorative and reflective experience. <i>Results?</i></p> <p>Attendees rate balance activities as enjoyable, offering unique perspectives on occupation, and a significant positive feature of the conference. <i>Results?</i></p> <p>Attendees rate the setting as comfortable, reasonably priced, aesthetically pleasing, and providing appropriate supports for research presentations. <i>Results?</i></p>
<p><i>Quality of Conference Attendees</i></p> <p>2.14. Plan for establishing baseline estimate and ongoing monitoring of percent of conference attendees who are researchers is created.</p> <p>2.15. Explore the degree to which members wish SSO:USA to increase the</p>	<p>Plan for establishing baseline estimate and ongoing monitoring of the percent of researchers as conference attendees is developed and approved by Board.</p> <p>Plan for exploring the degree to which members wish SSO:USA to increase the</p>	<p>Communications, Conference, Research, Board</p> <p>Communications, Conference, Board</p>	<p>Plan for monitoring percentage of participation of researchers in conference developed and approved by 2/06.</p> <p><i>Plan approved by 6/04. Plan initiated by 10/04. Plan for use of feedback?</i></p>

interdisciplinary make-up of conference attendees.	interdisciplinary make-up of conference attendees by Board. Plan initiated.		
<i>Quality of Conference Experience Overall</i> 2.16. Conference is effectively evaluated and continually improved.	A plan for effective evaluation and continual improvement of conference is created and Board gives input. Plan is implemented. Survey of attendees annually.	Conference, Board Conference Conference	Conference evaluation and improvement plan approved by Board in 2004. <i>Discuss plan in December?</i> Conference evaluation and improvement plan implemented in 2005. Overall conference experience is rated as highly positive by conference attendees.
2.17. Conference attendees are provided with effective opportunities to discuss and give input on directions of SSO.	Plan for attendee input at conference on directions of SSO is developed and approved by Board. Plan is implemented. Survey of attendees.	Board, Conference	<i>Results?</i> Opportunities for conference attendees to give input on directions of SSO are provided in 2004. <i>Meet with the Board 2004.</i> Opportunities for conference attendees to give input on directions of SSO are rated as highly effective.
Goal 3. By 2009, SSO:USA will foster cutting edge theory and research through member research supports that result in significant contributions to occupational science.			
Two Year Goal	Activities	Implementers	Measures

<p><i>Supports for Research</i></p> <p>3.1 Supports beyond conference for networking, mentoring, and initiating and maintaining research collaborations are provided to members.</p> <p>3.2. Explore, discuss, and plan for potential offerings by SSO of research grant funding to specifically explore strategic questions in occupational science.</p> <p>3.3. Groups of scholars with similar interests within SSO are created to collaborate on researching specific areas.</p>	<p>Plan for offering members supports beyond conference for networking, mentoring, and initiating and maintaining research collaborations is developed and provided to the Board for input.</p> <p>Plan is implemented. Annual member survey. The potential for SSO to offer research grant funding is explored and discussed by Board. Plan created.</p> <p>Plan for organizing groups to research specific areas is developed and provided to the Board for input. Plan initiated.</p>	<p>Research, Communications</p> <p>Research, Communications Communications. Treasurer, Board</p> <p>Research, Board</p> <p>Research</p>	<p>Plan presented to Board by 8/04. <i>This goal behind on timeline.</i></p> <p>Plan is implemented by 8/05. Members rate supports for networking, mentoring, and initiating and maintaining research collaborations as highly effective.</p> <p>If approved by Board, plan for SSO to offer research grant funding is created by 3/05.</p> <p>Groups of scholars created in 2004 to collaborate on specific areas of research and are organized according to plan and timeline. <i>This goal behind on timeline.</i></p>
<p><i>Supports for Presentation and Publication Beyond SSO Conference</i></p> <p>3.4. Create and initiate a plan to disseminate research endeavors of members.</p>	<p>Plan for dissemination of member research developed and Board gives input. Plan fully implemented. Annual member survey.</p>	<p>Research, Communications, Board</p> <p>Research, Communications Research, Communications</p>	<p>Plan presented to Board by 10/04. <i>This goal behind on timeline</i></p> <p>Members rate dissemination of member research as highly effective.</p>

<p>3.5. Members are kept informed of related presentation and publication venues.</p>	<p>Plan for informing members of related presentation and publication venues proposed to Board for input. Plan fully implemented. Annual member survey.</p>	<p>Research, Communications, Board Research, Communications Research, Communications</p>	<p>Dissemination implemented by 10/05. Plan presented to Board by 9/04. <i>This goal behind on timeline</i> Members rate information on venues for presentation and publication as highly effective. Dissemination implemented by 9/05.</p>
<p><i>Facilitating Access to Societies and Researchers with Related Interests</i></p> <p>3.6. Provide listing of research societies, occupational science societies, and their events.</p> <p>3.7. Develop a system of networking with international occupational scientists.</p>	<p>Plan for listing of research and occupational science societies and their events developed and Board gives input. Plan fully implemented. Annual member survey. Plan for a system of networking with international occupational scientists developed and Board gives input. Plan fully implemented. Annual member survey.</p>	<p>Research, Communications, Board Research, Communications Research, Communications Research, Communications, Board Research, Communications Research, Communications</p>	<p>Plan presented to Board by 8/04. <i>This goal behind on timeline.</i> Listing implemented by 8/05. Members rate listing as highly effective. Plan presented to Board by 2/05. <i>Does this go beyond PR Plan for working with JOS and ISOS?</i> Plan implemented by 3/05. Members rate international networking as highly effective.</p>
<p>Goal 4. By 2009, SSO:USA will have effective and useful relationships with other organizational entities and established mechanisms for disseminating occupational science beyond the discipline and the profession.</p>			
<p>Two Year Goal</p>	<p>Activities</p>	<p>Implementers</p>	<p>Measures</p>

<i>Public Relations</i> 4.1 Create a 5-year Public Relations Plan and Implement a 2-year Public Relations Plan.*	Public relations plan developed by Board. 2-year plan fully implemented.	Board Board, Committees	<i>5-Year Plan developed by 7/04. 2-year Plan implemented by 10/04.</i>
Goal 5. BY 2009, SSO:USA will clearly demonstrate through multiple venues the relationship of occupational science to occupational therapy.			
Two Year Goal	Activities	Implementers	Measures
<i>Relationships with OT Organizations</i> 5.1. An SSO Public Relations Plan will include the development of liaisons and possible collaborations with occupational therapy organizations.*	See Public Relations Plan, 4.1		
<i>Supports to Occupation-Based Practice</i> 5.2. Support a continued presence in the OT literature of occupational science research and theory. 5.3. Support the dissemination of occupational science and occupation-based practice to academic occupational therapy programs.	Plan for a continued presence developed and Board gives input. Plan implemented. Plan for dissemination to academic programs developed and Board gives input. Plan implemented.	Research, Communications, Board Research, Communications Board Research, Communications	Plan presented to Board by 3/05. Plan implemented by 9/05. Plan presented to Board by 4/05. Plan implemented by 9/05.

1.13. Develop and initiate timely and effective communication to members. (Ideas to consider: web page, themed discussions via the web, list serve, newsletter, society journal, surveys, voting, dissemination of publications, and themed discussions at conference.)

4.1 Create a 5-year Public Relations Plan and Implement a 2-year Public Relations Plan. (To include event publicity, collaborative relationships with other entities, seeking society funding, and dissemination of occupational science research to a variety of audiences.)

5.1 An SSO Public Relations Plan will include the development of liaisons and possible collaborations with occupational therapy organizations. (Consider in this the following ideas: Invite sponsorships for annual conference from AOTA, AOTF, AJOT, etc. Establish an annual plenary with AOTA conference of presentation of occupational science research topic. Provide information about the SSO:USA at the annual AOTA Conference. Booth?)