The Issue Is... Personal Strategic Plan Development: Getting Ready for Changes in Our Professional and Personal Lives

Jim Hinojosa

We each need to envision our own future and create a personal strategic plan to address our professional needs and to help us focus on developing our professional career. In the near future, we will face many changes in our health care system and in the fabric of our modern lifestyles. If we are to deal with these changes effectively, we need to understand them and be prepared with a personal strategic plan that supports both our own growth as individual professionals and the growth of the profession as a whole.

It is important that we understand our challenges to prepare and create the future that we want as occupational therapists and occupational therapy assistants. As health care and education reform becomes reality, reformers and other professionals will question the very need for occupational therapy. Every occupational therapy practitioner must answer the call to communicate occupational therapy's value to society. Moreover, we must become actively involved in restructuring the U.S. health care and education systems to carve out a more prominent place for occupational therapy.

As we are all aware, health care in the United States is going to change significantly under Public Law 111–148, the Patient Protection and Affordable Care Act of 2010 (Graham, 2010; Zuckerman, 2009). Health care costs will likely continue to rise, and the effect will be increased stress on taxpayers and employers. Although hospitals and other health care systems will continue to try to control costs (Kellis, Rumberger, & Bartels, 2010), we do not know how this scenario will affect occupational therapy. What we do know is that we could passively wait for changes and then respond; alternatively, we can become involved and use these opportunities to advocate for the value and cost-effectiveness of occupational therapy.

In equal measure, we need to be ready for A Blueprint for Reform: The Reauthorization of the Elementary and Secondary Education Act (U.S. Department of Education, 2010), in

which President Obama proposed priorities of promoting equality and meeting the needs of diverse students. The proposed plan supports programs, projects, and strategies that specifically improve the learning opportunities for children with disabilities. We must be ready for the future of education in the United States— an environment in which learning outcomes and cost-effectiveness will be priorities.

Planning for a Rapidly Changing Future

Experts (Aspinwall, 2005; Prenda & Lachman, 2001) have argued that we must engage in future-oriented planning to get ready for times to come. Future-oriented planning involves visualizing the future on the basis of known facts. Research by Prenda and Lachman (2001) has established a positive relationship between future-oriented planning and life satisfaction, showing that planning leads to a greater sense of control and an increased perception of well-being.

One method of future planning is to reflect on several possible scenarios and create a vision to support the desired outcome. For example, the American Occupational Therapy Association (AOTA; n.d.) used future scenarios for strategic planning to prepare for 2017, the year in which occupational therapy will celebrate its 100th anniversary. The resulting strategic plan supports the unique role that occupational therapy plays in meeting the needs of society in the 21st century and also communicates that role to the public, policymakers, payers, and clients.

AOTA began to create this plan in 2004 by examining trends in population, demographics, science, technology, and health care. In 2005, 1,500 participants contributed written recommendations and perspectives addressing given scenarios and major societal trends in the areas of aging and longevity, the changing world of work, stress and depression, health care costs, reimbursement, and the efficacy of care (AOTA, 2007). The AOTA Board of Directors reviewed the comments and written recommendations and identified six broad overarching areas of practice, which they subsequently used to develop the strategic plan (AOTA, n.d.).

As a result of AOTA’s strategic planning, in January 2006 the leadership adopted a vision statement to guide the Centennial Vision for the profession: “We envision that occupational therapy is a powerful, widely recognized, science-driven, and evidence-based profession with a globally connected and diverse workforce meeting society’s occupational needs” (AOTA, 2007, p. 613). Building on this vision, the AOTA Board of Directors identified key objectives that the profession will achieve by 2017. AOTA’s future planning has already been successful in uniting members in a future-oriented vision (Moyers, 2007). AOTA’s strategic plan provides direction for the profession; however, we each need to supplement, augment, and strengthen that plan with our own personal planning.

How Should We Go About Our Individual Strategic Planning?

Sherman (1991) observed that “planning is the design of a hoped-for future and the development of effective steps for bringing it about” (p. 4). Future scenarios may be useful for reflection, yet they may not help us create our own personal strategic plans because they are based on events that are plausible but may not become grounded in our personal circumstances. Sherman thus laid out a rational, systematic method for future planning that combines personal experience, knowledge, and skills with realistic assessments of both where we are and where we would like to be. Through his systematic process, we think about the future in terms of facts instead of fantasies.

Another common method is to anticipate future challenges and barriers in light of previously developed specific long-term goals. Both strategies might be useful at different times. However, I suggest that we begin with a focused and simple method using our personal circumstances as they exist today as the point of departure. Moreover, I believe that we need to focus on the totality of our practice—meaning that we need to examine not only what we do with clients, but also how we interact with professionals as part of our interventions. To that end, in this column I have adapted Sherman’s (1991) ideas and integrated them with AOTA’s model for continuing competence (Moyers & Hinojosa, 2011).

Sherman (1991) wrote about people who could not find a hopeful future even though they did things that successful people do. Such people attend workshops, retreats, and seminars but never become successful in spite of these actions. Most important, they want to do better. In response, Sherman proposed an organized, rational, and systematic method of planning and making decisions that is grounded in a realistic assessment of one’s situation. I advocate for the adoption of these principles in my approach to planning and decision making. The approach I propose consists of an examination of our professional responsibilities, a self-assessment of our work situation and relationships, and strategic planning and decision making.

Examination of Professional Responsibilities

In the first step toward developing a personal strategic plan, we examine our professional responsibilities. A constant challenge in our professional lives is maintaining competence because we naturally face new, different, or additional challenges over time.
Competence is not a constant; we can be competent today and incompetent tomorrow because of changes in technology, in clientele, or in the work environment. Throughout our professional lives, we need to acquire new knowledge and skills.

Indeed, as our professional lives evolve, we may accept new roles that are separate from those of a practitioner. For example, an occupational therapy practitioner could become a full-time administrator or assume the supervision of a student. A practitioner might develop a health-related business or accept an academic position. Such transformations force us to develop or refine our knowledge, attitudes, and skills. Moreover, when we are not working directly with clients, we must work harder to maintain an integrated, internalized professional identity as an occupational therapy practitioner. As we work toward constructing a strategic plan, we must take into consideration all such changes and potential changes in our responsibilities.

**Self-Assessment of Work Situation and Relationships**

Today’s practice and work environments are unstable. I can confidently write that most of us are overwhelmed with increasing expectations and new responsibilities at work. We have increased performance expectations from our employers. In addition, we impose demands on ourselves to achieve and perform at higher levels. In the attempt to do it all, we try to find ways to fit more in. We take our smart phones and laptops on vacation to check e-mail; we listen to phone messages at night, we bring more work home (Freeman, 2009), and we are increasingly concerned about our need to remain current to provide evidence-based practice. In the end, we have overlapping demands, more deadlines, fewer breaks, and more to remember. Some of us are beginning to realize that we cannot do it all. We feel overwhelmed.

In this world of ever-increasing expectations, we also struggle to merge our fantasy of occupational therapy with the reality of today’s practice. Our values often come into conflict with workplace demands and with employer and business models (Carney, 2006). At other times, our practice may become repetitive, tiresome, or boring. In such situations, we may not perform the art of practice. We must therefore take the time to reflect on our changing environments, expectations, and activities, for if we anticipate change we can develop strategies to ensure that our practice does not become repetitive, tiresome, or boring. If we think about the future, we can speculate on what competences, knowledge, critical reasoning skills, interpersonal skills, performance skills, and ethical reasoning skills we might need. Such reflection will allow us to anticipate future demands and give us time to prepare for them so that we will live up to future expectations and continue to practice the art of practice.

Above all, I believe that the efficacy of our practice is grounded in our interactions with our clients and colleagues. In the work environments of today, however, both our relationships and our interactions are often of short duration. It is a challenge to establish effective working partnerships under these conditions. Nonetheless, we must find ways to create and cement a successful rapport with our clients and colleagues.

An important change affecting our relationships today is technology. Given the rapid advances in technological innovation and the extent of its impact on society, technology will likely continue to have a crucial influence well into the future. Often, we rationalize the use of technology by saying that we get more done with greater ease. We continually replace our technology with new technology. However, the tools designed to make us more connected and effective—cell phones, pagers, smart phones and tablets, e-mail—may actually end up making us feel disconnected and ineffective (Freeman, 2009; Martin, 2010). Our obsession with immediate communication does not give us time to reflect or truly interact with others; most often, we respond to each other in short notes, and our online communications have little depth. In addition, instant communication may distract us from looking beyond the immediate task, preventing us from considering longer term tasks. Although we may value the instantaneous exchange of information, we need to examine how technology is influencing our interactions with others. We must take the time to communicate and interact with all the members of our team.

Communication is also key to the status of our profession. Today, clients and employers expect affordable and high-quality interventions, and we are under incredible pressure to increase our productivity with fewer resources. Although we must have a clear focus on quality practice and provide interventions that result in recognizable outcomes, I propose that it is equally important that we develop skills to influence people. Researchers (Moran, Bekker, & Latchford, 2008; Phillipson, Jones, & Wiese, 2009) and writers (Covey, 2004; Pichler, 2010) have agreed that the most important tool for influencing people is effective communication.

Influential people listen and respond effectively to others. They take the time to hear what other people are saying. Powerful and influential professionals are also effective collaborators; in a time when everyone feels rushed, they schedule their lives so they can have open discussions. They listen to others, and they respect others’ opinions. Occupational therapy practitioners should step up to exercise leadership during collaborations.
among various professionals, and they should assert their value and unique contributions.

Relationships are critical to the success of occupational therapists and occupational therapy assistants. As we become more effective in our working relationships, we also become more respected, influential, and powerful. In turn, when clients and professionals respect us as occupational therapy practitioners, they come to understand the value and contributions of occupational therapy, and our profession becomes more influential and powerful.

Strategic Planning and Decision Making

Developing a strategic plan begins with an examination of our reflections, from which we create a personal vision statement—a depiction of what we want to achieve. As a summary of all the information we have gathered from our personal reflections, this vision statement guides us in developing and implementing a personal strategic plan by giving us a basis for making decisions and taking action (Heathfield, 2011).

In short, our personal vision statement provides a framework or blueprint for our personal strategic plan. This plan should go beyond the work we do with clients and should identify what actions we can take to influence both our own future and that of our profession positively. AOTA’s Centennial Vision provides our profession with direction. It is time for us to develop our own personal centennial vision to guide us in our career development.

I assert that the most meaningful long-term changes for occupational therapy will, in fact, emerge from what we do as individuals. In our strategic plan, we must prepare for a future in which others recognize us as competent, effective practitioners. We should include specific strategies to promote occupational therapy to our clients, colleagues, other professionals, and friends. In addition, our personal strategic plan must reflect the value of occupational therapy and include strategies for establishing and maintaining effective professional relationships to help us succeed in meeting the needs of our clients. Some possible actions we might include in a strategic plan are as follows:

- **Personal development actions.** These strategies should specifically address how we can more effectively apply the principles of person centeredness in dealing with clients, colleagues, and friends; we must identify how to respect the perspectives of others and set priorities with careful consideration of everyone involved. We could plan to arrange our daily activities so that we have more time to talk to people and have real face-to-face conversations. When working with clients, we might focus more on quality of life and each client’s dreams, aspirations, and desires. We could promote practices that give clients more control over their life decisions.

- **Career actions.** We should plan to expand our roles and responsibilities by enhancing our competence or promoting our reputation in our position. We might plan to pursue further education. We might volunteer to serve on a community board. If we own a private practice, we could develop a plan to assess the health needs of our community to ensure that we are serving the needs of our clients. We might also plan to pursue advanced certification to support our practice skills. When developing career actions, we should consider our personal career opportunities and focus on the strengths we have and those we can augment to advance our professional lives.

- **Actions to promote practice.** We advance our professional practice when we disseminate knowledge about the important contributions of occupational therapy. Thus, actions focusing on promoting our professional practice could include a continuum of activities ranging from presenting at one’s institution, to lecturing on a health issue in a community center (e.g., fall prevention, living with arthritis), to lecturing at a university program. We might also design a writing plan to publish an article in the local newspaper or in a professional journal.

- **Actions to address technology.** Today, all plans must include decisions on how to address rapid technological advances. We should decide what technological and computer skills we need to learn, strategically selecting technologies to help us develop effective intervention plans for clients and manage our day-to-day administrative and communication responsibilities.

- **Review strategies.** Finally, no plan is complete without specific strategies to address future changes in our planning. We must explicitly state how we will review our progress and our planning needs. We must also design specific plans for how we will continue to be informed about changes in our practice areas and about transformations in health care and education policies that will influence our professional lives.

It is important that we put our personal vision statements and strategic plans in writing. Recording our strategic plans facilitates their implementation. Furthermore, writing down a plan documents our commitment to it. When we are ready to commit our strategic plan to writing, our reflections should culminate in a realistic number of goals. We must write goals that are SMART—that is, Significant, Measureable, Achievable, Relevant, and Time-bound (Kouzes & Posner, 2000; Prather, 2005).
Conclusion

We live in exciting and challenging times, and we must accept that change is part of life and respond to rapid transformations in our work and environment. We must reaffirm our commitment to effective communication as a crucial part of the art of our practice by arranging our daily activities so that we can make time to have face-to-face conversations. We must promote our profession by attending formal and informal gatherings in which we get to know fellow professionals as individuals. Most of all, we must think strategically to create the future that we want and need for our clients. Remember, our profession’s future does not rest on what AOTA develops; rather, it depends on how each of us lives as a modern professional. In other words, the future of occupational therapy is in our control. I challenge you to become strategic planners and embrace a visionary future. As Eleanor Roosevelt said, “The future belongs to those who believe in the beauty of their dreams.” We must each construct our own personal centennial vision to create the future for occupational therapy that we desire. ▲

Acknowledgments

This article is based on a presentation titled “Practice Challenges in the Next Millennium,” a keynote address delivered at the New York State Occupational Therapy Conference, November 16, 2010.

References