

**IPA 2021-2024 Strategic Plan (revised 29-Jan-2024)**

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## **IPA 2021-2024 Strategic Plan**

### **Introduction**

The IPA Strategic Plan Committee (SPC), composed of members of the Iowa Psychological Association (IPA) Executive Council (EC) and other IPA leadership, began meeting in early 2019 to identify an effective process for developing IPA's next strategic plan which will begin in 2021. While previous strategic plans have been both comprehensive and helpful in assisting IPA in achieving its goals, areas for improvement in the strategic planning process have been identified. Specifically, the SPC has identified the importance of focusing on both the "content" (e.g., specific themes, goals, objectives) and the "process" (e.g., measurement, implementation) of the strategic plan. With this in mind, the SPC has proposed a method that honors ongoing IPA initiatives, fosters new ideas, and places an emphasis on ongoing assessment, measurement, and execution of the strategic plan over time.

This document will first present progress made toward the goals from the 2017-2020 Strategic Plan. Next, the document will provide the methods employed to develop the 2021-2024 Strategic Plan. It will outline the strategic planning data collection strategy, framework and method for creating the strategic plan, and a process for implementation and measurement of the plan over time. Additional documents that provide contextual information to support the plan can be found in the Appendix at the end of this document.

### **2017-2020 Strategic Plan**

The most recent strategic plan, which was completed in 2016, was an incredibly comprehensive document and guided IPA from 2017-2020. At that time, a thorough review of the organization's current state was completed with the purpose of guiding the future direction of IPA. In-depth analyses of IPA's financial situation and the changing demographics of psychologists within IPA and across Iowa were conducted. Information collected from membership as well as the financial review helped inform goals and tactics that focused on four key areas:

1. Leadership/Financial Goals
2. Membership Goals
3. Conference/Training Goals
4. Culture/Community Goals

### **Progress Made Toward 2017-2020 Strategic Goals**

The following section outlines the four key themes from the 2017-2020 strategic plan and provides an assessment of progress made toward each goal. More specifically, previously identified goals have been categorized into one of three categories: significant progress toward goal; some progress toward goal; and minimal progress toward goal. IPA Leadership reviewed and discussed the progress toward goals until consensus was obtained.

For reference, the 2017-2020 strategic plan can be accessed by visiting the IPA website.

### **Theme #1: *Leadership/Financial Goals***

Significant progress made toward goals:

- To establish a more robust and representative membership committee.
- To establish a conference committee that can serve and expand the training needs our members.
- Re-define the role of the Executive Director to ensure the contract can be reduced so that it does not result in another deficit during a fiscal year for IPA.
- Build more cohesion and collaboration amongst the leadership of the organization.
- Establish annual budgets for IPA that align with the strategic plan and safe guard against deficits.
- All contracts and budgets that are overseen by the organization will be established between the finance committee and IPA president.
- The Executive Council will review financial reports on a bi-monthly schedule during Executive Council meetings.
- Advocacy efforts will be limited to the revenue that is generated from advocacy assessment dues.
- A professional bookkeeper will be contracted for cost-savings and to ensure that financial transactions, reporting, and general bookkeeping is maintained accurately.
- The Treasurer as well as the Finance Committee will collaborate with the Conference Committee to set a budget for each event.
- An annual fundraising event will be held to generate additional revenue for the organization.

Some progress made toward goals:

- Membership dues will be reviewed and a new fee structure will be recommended.

Minimal progress made toward goals:

- To evaluate the role of the three IPA Representatives and the duties that they perform for the organization.
- Close committees that have not been active and merge those who collaboration can benefit the organizational goals of the strategic plan.
- Define the past-president role to include coordinating the execution of the strategic plan.

### **Theme #2 *Membership Goals***

Significant progress made toward goals:

- Promote maintenance of IPA membership.
- Re-examine list of services and benefits offered by IPA to each membership category.

- Improve communication to members and non-members.
- Simplify membership application process.
- Encourage regional communities to develop.
- Recruit more licensed psychologists.
- Recruit psychology and undergraduate and graduate students.

Some progress made toward goals:

- Establish an event specific to membership recruitment.

Minimal progress made toward goals:

- Recruit psychology faculty and counseling center staff.

### **Theme #3: *Conference/Training Goals***

Significant progress made toward goals:

- Ensure that membership has a voice in picking conference topics/themes.
- Plan programs that are relevant to all membership categories.
- Re-design order of programming to allow for networking.
- Attempt to bring speakers who can address depth of topics instead of offering broad introduction.
- Improving marketing and promotion of training events.
- Use technology to make trainings available to more members and audiences.
- Revamp student poster presentation sessions.
- Try to offer programming that addresses diverse needs.

Some progress made toward goals:

- Tap into resources we have within the state to minimize cost of speakers.
- Find new ways to incentivize conference attendance.
- Review the cost of registration for conferences/trainings.

Minimal progress made toward goals:

- None identified.

### **Theme #4: *Culture/Community Goals***

Significant progress made toward goals:

- Create a clear vision for diversifying the organization.
- Encourage programming that supports group development.
- Ensure that IPA events have opportunities to cultivate group cohesion.

- Consider the activation of the Diversity Committee to ensure that Black, Indigenous, and People of Color are supported within IPA.

Some progress made toward goals:

- Define the culture that we want to create and publicize amongst members and non-members.

Minimal progress made toward goals:

- Establish a new mission, vision, and values.

### **Summary of Progress made towards 2017-2020 Strategic Plan Goals**

In summary, IPA has made tremendous progress toward achieving the goals of the 2017-2020 strategic plan. The following examples are provided to demonstrate progress made:

- Financial
  - IPA has made significant progress toward addressing its financial situation. From 2013-2016 IPA, borrowed \$70,000 from the investment account because to cover its operating expenses.
  - Restructuring the Executive Director's duties, hiring a professional bookkeeper, and having the Executive Council, Treasurer, and Finance Committee take a more active role in managing and overseeing IPA's finances has contributed to IPA financial turnaround.
  - Currently, IPA has repaid \$36,000 to the investment account with a plan to pay back \$6,000 per year until all funds have been paid back in full.
- Committees
  - There has been a resurgence of standing IPA committees including Membership, Finance, Early Career Psychologist, Advocacy, Ethics, Psychopharmacology, Public Education, Website, and Conference/Training.
  - In regards to the Culture/Community goals, the creation of the Diversity and Social Justice Committee (DSJC), and Diversity Liaison position for the Executive Council, has had a significant impact on IPA becoming more aware of issues of diversity, social justice, and inclusion.
  - The membership committee has made significant progress toward addressing strategic plan goals by engaging current members, recruiting new members, and communicating the value of an IPA membership to psychologists.
- Conferences and Training
  - Additionally, progress has been made related to goals surrounding IPA's conferences and trainings as evidenced by increased interest and attendance from IPA members and non-members. The marketing, advertising, and promotional talents of IPA's Executive Director has certainly contributed to success in the area of conferences and trainings along with training topics that have broad appeal to psychologists from different backgrounds and professional areas.

### **Challenges and Additional Areas for Improvement towards Goals**

While considerable progress was made toward the goals of the past strategic plan, a number of challenges emerged regarding the implementation of various strategic planning initiatives, prioritization of strategic planning goals, measurement of progress toward goals, and consistent focus on goals and priorities. Some of the challenges were due to personnel changes, including hiring a new Executive Director and professional bookkeeper for the organization. For a substantial period of time, IPA leadership had to focus efforts exclusively on the day-to-day operations of the association and not necessarily on strategic planning goals in order to maintain viability of the organization and overcome immediate obstacles. While this method was successful in bringing stability to the organization, it resulted in limited time and resources being directed toward larger strategic planning initiatives.

Additionally, IPA has not had the time/opportunity to conduct a thorough review of its mission/values as well as any leadership positions or committees that may be inactive, outdated, or redundant. There are likely additional opportunities to increase efforts in recruiting new members, retaining current members, providing relevant and timely continuing education trainings, and continuing to strive for an IPA culture and community that is warm, inviting, collegial, and inclusive.

The IPA Strategic Plan Committee (SPC), has recognized some of the challenges associated with the past strategic plan and has identified the importance of focusing on both the “content” (e.g., specific themes, goals, objectives) and the “process” (e.g., measurement, implementation) of the strategic plan. With this in mind, the SPC has proposed a method that honors ongoing IPA initiatives, fosters new ideas, and places an emphasis on ongoing assessment, measurement, and execution of the strategic plan over time. This document will outline the strategic planning data collection strategy, framework and method for creating the plan, and a process for implementation and measurement of the plan over time. Additional documents that provide contextual information to support the plan can be found in an Appendix at the end of this document.

### **2021-2024 Strategic Plan**

#### **Multi-Method approach to gathering information for the 2021-2024 Strategic Plan**

The IPA Strategic Plan Committee (SPC) aimed to develop a wide-reaching and inclusive process for gathering important data from key stakeholders and licensed psychologists across the state of Iowa. Information was collected through two Virtual Town Hall Meetings and the IPA/IPDH Strategic Planning Survey, a survey developed in collaboration with the Iowa Department of Public Health and distributed to all licensed psychologists in Iowa. An overview of the results of initiatives is provided below.

#### *Virtual Town Hall 1.0: The Future of Psychology in Iowa*

On Saturday, November 2<sup>nd</sup>, 2019, IPA entered into a new digital age by hosting an inaugural Virtual Town Hall meeting. Over 40 psychologists and psychology trainees from 9 host sites across the State of Iowa (and elsewhere), both IPA members and non-members, participated in a

town hall style event to discuss the future of psychology in Iowa. The goal of the event was to hear from as many Iowa psychologists as possible to learn how IPA is serving them and how we might be able to serve them better in the future. Psychologists from all professional areas including those in clinical practice, research, consultation, and faculty roles, as well as doctoral students in applied psychology were invited to participate. During the first hour of the event, attendees participated in small-group breakout sessions and answered three broad questions posed by the strategic planning committee. The three questions are noted below:

- Question #1: What are the top three challenges you experience as a psychologist?
- Question #2: What are the top three changes you'd like to see made?
- Question #3: What are three actions you'd be willing to take based on the discussion today, and how can IPA support this?

Each site host was responsible for guiding the discussion in their setting and taking notes. During the second hour, all of the groups came together via Zoom (video conferencing) to report ideas and engage in a large group discussion. The second half of the meeting was facilitated by group dynamics expert Dr. Nathaniel Wade. Eight themes emerged from this event:

- Improving access to care (e.g., rural mental health; telepsychology).
- Promoting the value or uniqueness of psychology to the general public and other entities (e.g., insurance companies)
- Training Psychologists and engaging students
- Business of psychology
- Value of IPA membership
- Building connections, community, and engaging psychologists in Iowa
- Recruiting and retaining psychologists to live and work in Iowa
- Prescriptive authority for psychologists in Iowa

Information from the virtual town hall meeting can be found in Appendix A.

#### *Virtual Town Hall 2.0: Refining the Strategic Plan and Setting Goals for the Future*

On June 19<sup>th</sup>, 2020, 55 IPA members and non-member psychologists gathered via Zoom to discuss the future of Psychology in Iowa in an event titled *Virtual Town Hall 2.0: Refining the Strategic Plan and Setting Goals for the Future*. This event was a follow-up to the first Virtual Town Hall meeting held on 11/2/2019 with the primary goal of developing action items based on key topics emerging from the first Virtual Town Hall meeting. Attendees participated in one of five breakout groups to discuss key issues that Iowa psychologists face, brainstorm ideas, and generate action items to address these issues. Each workgroup was facilitated by a member of IPA leadership, and the goal for each group was to generate at least three specific recommendations or “action items” that may be taken into consideration in the development of the strategic plan. Group facilitators proposed three questions to group members:

- Question #1: What specific and measurable steps could be taken to address the themes in the short term (within the next year)?
- Question #2: What specific and measurable steps could be taken to address themes in the long-term (greater than one year)?
- Question #3: In what ways would you like to be involved to address these issues? What actions are you willing to commit to today?

The SPC incorporated key pieces of information and action items into a narrative that has helped guide the direction of the Strategic Plan. Information gathered from the Virtual Town Hall 2.0 session is noted in Appendix A.

### *IPA/IPDH Strategic Planning Survey*

IPA and the Iowa Department of Public Health (IDPH) teamed up to design and implement a 44 question survey to examine psychologist demographic characteristics, issues related to the business of psychology (e.g., billing/reimbursement), factors that influence the practice of psychology (e.g., delivering psychological services and access to care concerns), and how psychologists uniquely contribute to the well-being and public health of Iowans. On September 8<sup>th</sup>, 2020, all psychologists with an active Iowa license received an e-mail from IDPH inviting them to take the survey. Data gathered from the survey will help IDPH better understand the psychologist workforce and how psychologists address factors that impact the public health of Iowans. Once data collection is finalized, an additional report will be included in Appendix B.

### **Process and Content of the 2021-2024 IPA Strategic Plan**

#### *“Content” of IPA Strategic Plan: Themes, Goals, Objectives, Strategies & Tactics*

The intent of the strategic plan is to provide IPA standing committees with a framework to guide actions and initiatives that are consistent with organizational themes central to the mission of IPA. We have learned from previous years that overarching goals tend to remain relatively stable within IPA, but objectives may vary from year-to-year based on the immediate needs and resources available to IPA. The SPC attempted to strike a balance between maintaining previous goals while also allowing for flexibility to change objectives as necessary. The SPC developed an organized framework in which key organizational themes guide major goals, objectives, strategies, and tactics for the organization. Definitions for the aforementioned terms are noted below along with other supporting information and examples.

Definitions of key terms:

- *Themes:* Organizational “themes” are overarching themes that are central to the mission and purpose of the organization. Themes are aspirational in nature and provide a foundation for the association.
- *Goals:* “Goals” are broad intentions that guide objectives and tactics.

- *Objectives*: "Objectives" are defined as concrete, measurable actions that can be taken to achieve goals.
- *Strategies*: "Strategies" are ideas, or a set of ideas, that can be used to flesh out objectives.
- *Tactics*: "Tactics" are the specific actions that can be taken to execute strategies.

The data gathered from the two Virtual Town Hall meetings was synthesized into five key organizational themes that are critical to the identity and success of IPA. These five organizational themes will serve as a guide for IPA during the next three years:

1. *Education and Training*
2. *Diversity, Equity, and Inclusion*
3. *Building Connections and Community*
4. *Advocacy*
5. *Financial Stability*

The first four themes were generated from information gathered during the Virtual Town Hall meetings. While the fifth theme, *Financial Stability*, did not emerge during the Virtual Town Hall meetings, the SPC members thought it critically important to include given IPA's past financial challenges, the importance of achieving financial stability during challenging times (e.g., pandemic), and being good stewards of IPA's funds. Please see Appendix C for a document that outlines how key points generated from the Virtual Town Hall meetings map on to the five organizational themes.

While the key organizational themes outlined above are aspirational in nature and guide the organization, specific goals, objectives, strategies, and tactics help bring the strategic plan to life by creating actionable and measurable steps. The core strategy/focus of the 2021-2024 Strategic Plan will rely heavily on each IPA standing committee developing its own strategic plan using the framework outlined herein. The goal is for each committee to create a "living document" that can be modified or edited based on the current state of the association and other changes that are taking place in the world. The following paragraphs will provide examples from the Membership Committee to help illustrate how goals, objectives, strategies, and tactics fit together (The full 2020-2021 IPA Membership Committee Strategic Plan is provided in Appendix D).

"Goals" are broad intentions that guide objectives and tactics. An example of a Membership Committee high-level goal is "Enhancing Connections between IPA members." Committee goals should fall under one of the five organizational themes. The above goal could fall under the organizational theme of *Building Connections and Community*. It is possible that some goals may fall under several organizational themes. For example, another goal, "Recruiting New Members to IPA" could also fall under the organizational theme of *Financial Stability*.

For each goal, it is helpful to have several measurable objectives. "Objectives" are concrete actions, that are measurable, that can be taken to achieve goals. The SMART (specific,

measurable, attainable, realistic and time-based) framework can be used to develop objectives. Two examples of measurable objectives for the goal of “Enhancing Connections Between IPA Members” include 1) Increase IPA committee membership by desired capacity by December 21<sup>st</sup>, 2021, and 2) Host two conference events per year.

The development of particular strategies may help to conceptualize how objectives are achieved. As noted above, a strategy is an idea, or set of ideas that can be used to flesh out objectives. Examples of strategies for the objective “Increase IPA committee membership by desired capacity by December 21<sup>st</sup>, 2021” include:

- Executive Director routinely posts link to job descriptions in Monday Minutes
- Calls to action and link to job descriptions routinely posted to Facebook group
- Calls to action stated at the end of every committee meeting, including EC, asking members to approach people directly to request participation in committees that need members
- Offer periodic reward opportunities for people who join committees

Last, tactics can be created to enable the execution of specific strategies. For some tactics, it is important to have a deliverable date, while other activities will be ongoing with no end date. The creation of tactics will help align stakeholders on the expected time implications of specific tasks. The identification of resources is also an important aspect of developing tactics. Resources may include colleagues within IPA (a developer, graphic designer, legal adviser, etc.), partners, suppliers, or other stakeholders. A sum of the costs can be calculated for each tactic to be included in the annual budget for each committee. Last, each tactic is an action, and should generate a reaction. It is important to determine the ideal measurement type and desired outcome for each action. This final step is execution of the research and planning. Once this step is complete, each committee will have a detailed action plan that addresses all resources, and timing and budget issues.

Example tactics for the objective “Increase IPA committee membership by desired capacity by December 21<sup>st</sup>, 2021” includes:

- Post (with assistance from each committee) job descriptions for committee members and chairs on website, including desired committee capacity
- Assist in creation of committee E-lists – doubles as a method for tracking current committee members

Again, the purpose of the plan is for each IPA standing committee to create a “living document” that can be modified or edited based on the current state of the association and other changes that are taking place in the world. See Appendix D for the 2020-2021 Membership Committee Strategic Plan, a full example of how the Membership Committee used this framework to create goals, objectives, strategies, and tactics. Also, Appendix E has a Strategic Planning Worksheet that committees can use to guide their process for creating a strategic planning document.

*“Process” for Implementation of IPA Strategic Plan*

As previously noted, a primary area of emphasis of the current strategic plan is on the “process” and ongoing assessment, measurement, prioritization, implementation, and execution of strategic planning goals. The SPC believes that the proposed process and method will honor ongoing IPA initiatives, allow new ideas to be fostered, and provide a working process that is functional, dynamic, and engaging. Three primary bodies within IPA will be used to facilitate the “process” component of the strategic plan: IPA Standing Committees (SC) (e.g., Advocacy; Diversity and Social Justice; Early Career Psychologist; Ethics; Finance; Membership; Psychopharmacology; Public Education; Website; Training Task Force; and Conference Planning/Training), IPA Strategic Plan Committee (SPC), and the IPA Executive Council (EC).

Each IPA SC will be sent a copy of the plan and asked to use the Strategic Planning worksheet to create goals, objectives, tactics, and strategies for their respective committee. The above framework provides flexibility for committees to have plans that can be modified, revised, and changed over time to meet the needs of the specific committee and IPA. The SPC also believes this process will allow SCs the autonomy and flexibility to carry out plans for pre-existing goals and formulate new goals to meet the immediate needs of IPA and the broader community. SCs will measure progress toward goals and ensure that goals align with organizational themes. The SPC recommends that committees periodically review their Strategic Planning worksheet to ensure that goals are in line with IPA organizational themes.

One of the gaps in implementing initiatives from the past strategic plan related to communication from SCs to the EC and a lack of resources for the EC to carry out strategic planning initiatives. Additionally, EC meetings were typically focused on the day-to-day operations of the association which limited the time available to focus on strategic planning initiatives. To address these issues, it is recommended the SPC have a more permanent place as an IPA committee and meet quarterly to serve as a liaison between IPA SCs and the EC. The immediate Past-IPA President will serve as the chair of the SPC as they will have served on the EC for two years and have an intimate knowledge of IPA initiatives. Additional representatives from each IPA SC will be invited to participate in quarterly meetings. Members of IPA special committees may also participate in the SPC.

Starting in 2021, the goal of the SPC will move from developing the strategic plan to informing the EC of current strategic planning goals, measurement of goals, and implementation and execution of goals. The EC will take recommendations from the SPC and make decisions on IPA initiatives based on this feedback. The SPC believes this process will lead to more consistent alignment of executing IPA goals while taking into consideration key organizational themes. A description of the roles and responsibilities of the SPC can be found in Appendix F and it will be included in the IPA Policy and Procedures Manual.

**Measurement of Strategic Planning Goals**

Measurement of the strategic planning goals will require input and feedback from IPA SCs, EC, and SPC. As noted above, each SC will complete the Strategic Planning worksheet on an annual

basis. Each year SCs may review and retain goals, or write new goals that align with the 5 organizational themes. The measurement of the strategic planning goals will be accomplished through IPA's SCs submitting bi-monthly reports and an annual progress report to the SPC. SCs will be expected to submit reports every two months, to coincide with EC meetings. This will not be extra work for SCs as there is already an expectation to submit written reports to the EC. This format will also provide SCs with a structured framework to submit reports to the EC so all SC reports follow the same format. New IPA SC members will be provided with information regarding this process and be expected to adhere to the proposed guidelines. Furthermore, this process should help SCs stay focused on goals over the course of the year, provide clarity and consistency when tracking goals, and provide structure and flexibility when reviewing progress toward goals and generating reports.

On an annual basis, the SPC will compile the information collected from the SCs and create a summary report that will be submitted to the EC. The report will address global progress toward goals and how committees are working toward addressing the five organizational themes as outlined in the strategic plan. For example, it may be helpful to know if there are several SCs working on goals related to the *Educational and Training* theme, but relatively few committees are working on goals that fall under the category of *Building Connections and Community*. This format also provides a framework with how to address concerns about committees not making progress toward goals. The SPC could provide mentorship or guidance to SCs if there are concerns about not reaching goals or other issues that may arise on committees. The SPC can also make recommendations to the EC and the Presidential Triad if there are concerns that need to be addressed. This overarching structure will help the EC track each committee's progress, address any concerns that may arise, and keep "big picture" organizational themes and other important initiatives in the forefront.

### **Timeline of Implementation**

The strategic plan will be implemented starting in 2021 and go through 2024. By March of 2021, SCs will be expected to complete the strategic planning worksheet, create goals, and submit the worksheet to the SPC. Committees will submit a final report to the SPC by the end of 2021. The SPC will compile information for SCs and submit a full report to the EC before the IPA Business meeting in the spring of 2022.

Planning for the next strategic plan will begin during the second half of 2023. At that time, the strategic planning committee will review progress made toward strategic plan goals and make a recommendation to EC to continue with the plan as is, maintain the current process but create new themes, or begin developing a new plan during the 2024 year. The proposed plan is dynamic and "a living document" and it is designed to adapt to the changing needs of the association over time.

### Summary

- There has been a tremendous amount of progress made toward the goals of the 2017-2020 Strategic Plan in the following areas: Leadership/Financial; Membership; Conference/Training; and Culture/Community.
- A number of challenges emerged during the last strategic planning cycle related to implementation of various strategic planning initiatives, prioritizing strategic planning goals, measurement of progress toward goals, and consistent focus on goals and priorities. With these challenges in mind, the Strategic Planning Committee (SPC) has recognized the importance of focusing on the “content” (e.g., specific themes, goals, objectives) and the “process” (e.g., measurement, implementation) of the next strategic plan.
- A multi-method approach to gather data for the strategic plan was completed through three initiatives: two Town Hall Style meetings and a collaboration with the Iowa Department of Public Health (IDPH) to distribute a survey to all licensed psychologists in Iowa.
- The Virtual Town Hall meetings generated a large amount of data that was synthesized into five key organizational themes that are critical to the identity and success of IPA: *Education and Training; Diversity, Equity, and Inclusion; Building Connections and Community; Advocacy; and Financial Stability.*
- The intent of the strategic plan is to provide IPA committees with a framework to guide actions and initiatives that are consistent with organizational themes central to the mission of IPA. This will be accomplished by focusing on the “process” of the strategic plan and ongoing assessment, measurement, prioritization, implementation, and execution of strategic planning goals.
- Three primary bodies within IPA will be used to facilitate the “process” component of the strategic plan: IPA Standing Committees (SC) (e.g., Advocacy; Diversity and Social Justice; Early Career Psychologist; Ethics; Finance; Membership; Psychopharmacology; Public Education; Website; Training Task Force; and Conference Planning/Training), IPA Strategic Plan Committee (SPC), and the IPA Executive Council (EC).
- Each IPA SC will be sent a copy of the plan and asked to use the Strategic Planning worksheet to create goals, objectives, tactics, and strategies for their respective committee. This framework provides flexibility for committees to have plans that can be modified, revised, and changed over time to meet the needs of the specific committee and IPA.
- Measurement of the strategic planning goals will require input and feedback from IPA SCs, EC, and SPC. It is recommended that the SPC become a permanent IPA committee and meet quarterly to serve as a liaison between IPA SCs and the EC.
- Measurement of the strategic planning goals will be accomplished through IPA’s SCs submitting bi-monthly reports and an annual progress report to the SPC.
- The strategic plan will be implemented starting in 2021 and go through 2024, with planning for the next strategic plan beginning during the second half of 2023.



### **Strategic Planning Committee Members**

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**Appendix**

Appendix A: Virtual Town Hall 1.0 (11/02/2019) and 2.0 (06/19/2020) Summary of Key Themes

Appendix B: Summary report of IPA/IDPH Survey

Appendix C: Summary of Key Virtual Town Hall Themes Mapped to Organizational Themes

Appendix D: Strategic Planning Worksheet

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Appendix F. Strategic Plan Committee Description

## **Appendix A: Virtual Town Hall 1.0 (11/02/2019) & 2.0 (06/19/2020) Summary of Key Themes**

1. Improving access to mental health care for Iowans
  - a. Specific actions/steps to take to improve access to mental health care for Iowans:
    - i. Enhance and advocate for telehealth services and increase number of Iowans receiving mental health services
      1. Lobby legislators about the efficacy of telehealth services and to provide funding to support telehealth research.
      2. Approach non-profit organizations to provide funding to address access to care issues (e.g., provide financial support to Lions International to provide computers and access to individuals who need them).
      3. Collect data/resources that would inform psychologists about providing telehealth services.
      4. Survey clients about their experience using telehealth services.
      5. Advocate for broadband and internet connections in rural areas to enhance access to mental health care.
      6. Form special telehealth task force/committee to work on presenting materials to legislators to provide telehealth mental health services to homes, schools, and other sites.
      7. Provide pro bono services to facilitate people getting mental health services. IPA members could volunteer time to talk with individuals about their issues and make them aware of resources in Iowa to help them with their problems.
2. Promoting the value or uniqueness of psychology
  - a. Specific actions/steps to take regarding promoting the value or uniqueness of psychology:
    - i. Increase communication of psychologists' background (e.g., training in research/science), including how psychologists use effective treatments, to the general public, insurance companies, lawmakers, and other stakeholders to differentiate PhDs, PsyDs, Master level providers, and other professional degrees.
    - ii. Increase psychologists' visibility in the community by taking on leadership positions, going on radio/new programs, writing letters to the editor, building relationships with local and state lawmakers, and building connections with other community groups.
    - iii. Target prospective students to justify why a Doctoral degree is worth the time and effort versus a Master's degree.
    - iv. Produce public trainings/videos for the public about psychology, what it means to be a psychologist, and increase the visibility of psychologists around Iowa.
    - v. Emphasize public education regarding issues related to the availability and economics of access to mental health care. While many Iowans struggle with access to mental health providers, the general public may not fully recognize the severity of this problem across the state.

- vi. Create educational pamphlet for public education on what a psychologist is, how it differs from other professions (in a positive way), and can be used by psychologists in the state for talking points.
- vii. Develop a brochure to promote “Iowa” and “Iowa Psychology” to professionals who have the potential to work in Iowa may help promote positive aspects of being a psychologist in Iowa.
- viii. Create a toolkit that Iowa psychologists/IPA members could have to demonstrate our worth or value in financial terms to the general public and insurance companies (e.g., if someone presents at the ER for a panic attack, a brief course of CBT may decrease the risk of the patient visiting the ER again, which would ultimately lead to a cost reduction for the healthcare system).

### 3. Training Psychologists & Engaging Students

- a. Specific actions/steps to take regarding training psychologists and engaging students:
  - i. IPA could have conversations with undergraduate, master’s, and doctoral programs in Iowa (e.g., University of Iowa; Iowa State) to focus on enhancing partnerships, creating new training opportunities (e.g., practicums, creating internships), and connecting with IPA on training needs in the state.
  - ii. Explore the possibility of creating an APA-accredited pre-doctoral internship consortium to help to meet rural needs and general needs for training. Seek additional grants to help with the final cost of seeking APA accreditation.
  - iii. Create diverse opportunities for training and include a wide range of demographics and diversity training.
  - iv. Explore opportunities to train psychologists in unique and interesting ways (e.g., telehealth training, via practicum placements for graduate students at State Universities) may help increase the retention of students to live and practice in Iowa.
  - v. Create a student-focused brochure which may aid in the recruitment of more student members to IPA
  - vi. Create mentorship/sponsorship program in which IPA members sponsor IPA student membership fees for doctoral students.
  - vii. Approach the University of Northern Iowa (strong mental health and social services programs), St. Ambrose University, or Des Moines University to see if they would be interested in starting a professional school to train psychologists.
  - viii. Advocate for legislation for pre-doctoral interns in Iowa to bill under a licensed psychologist.
  - ix. Reach out to Iowa Training Directors at VAs and other training sites regarding the creation of training opportunities.

### 4. Business of Psychology

- a. Specific actions/steps to take regarding the business of psychology:
  - i. Advocate for reimbursement, parity, and telehealth at the state and federal level.

1. Advocate for the importance of psychologists in medical settings and advocate for reimbursement equivalence of mental health and behavior health codes.
  2. Increase grass roots lobbying efforts by psychologists writing advocacy letters to build relationships and connect with lawmakers.
  3. Collaborate with APA to work on reimbursement for H/B code while ensuring parity with MH codes.
  4. Federacy Advocacy Chair could share APA initiatives with membership, via the IPA listserv, and encourage members to share their advocacy efforts and letters they send to lawmakers.
  5. Re-think how the FAC may leverage the work of other state's legislation and share resources. A listserv or Facebook could accomplish this.
  6. IPA website directory could include what senate and house districts members are in.
  7. Continue to advocate for telehealth parity and equitable reimbursement for services provided.
  8. Continue to protect against predatory audits from insurance companies.
  9. Ensure that adequate reimbursement is being received for psych testing codes and group psychotherapy codes.
  10. Continue to leverage organizational leaders in other organizations to help advocate together.
  11. Create a training seminar on "How to advocate for different legislation, How to get involved, How to approach your Senator."
  12. Establish a committee for each of the FAC and SAC so that additional people could be involved and learn about advocacy.
  13. Create a Director of Professional Affairs (DPA) position for IPA to work with insurance companies and other stakeholders.
- ii. Build the reputation of Psychology in Iowa and branding of Psychology
1. Advocate for qualified psychologists to practice in Iowa and advocate for out-of-state psychologists to provide the same quality of services compared to Iowa Psychologists (e.g., PsyPACT).
  2. IPA could apply for grants to have public health announcements about mental health and how to utilize mental health services. This could also involve hiring a branding agency/advertising group.
- iii. Stigma and understanding psychology/public education
1. Address mental health stigma, promote mental health/public education, and outreach in Iowa, particularly among hospitals and other institutions.
- iv. Transparency of insurance information and deductibles, etc.
1. Work to enhance transparency regarding clients/patient's deductible and copays will help psychologists and clients/patient's
  2. Apply for grants that would assist with telehealth.
- v. Building connections with external partners

1. Have an FAQ section on the website that provides answers to frequently asked questions and issues that have been addressed and to encourage continued communication between different administrations and councils.
  2. Increase relationships with agencies and organizations (e.g., The Iowa Harm Association, NAMI). Increase connections between members and their associates in order to move towards IPA goals.
5. Value of an IPA Membership (#5)
- a. Specific actions/steps to take regarding promoting the value of an IPA Membership:
    - i. Continue to send letters to non-IPA members regarding IPA's advocacy efforts. It may be helpful to communicate a clear and concise summary of what IPA is doing for its members and all psychologists in Iowa and to increase awareness of what IPA is doing for the general public. This may include recognizing the actions that IPA has taken regarding recent advocacy issues (e.g., insurance company audits, clawbacks, promoting telehealth parity).
    - ii. Develop key features of IPA's membership directory on the website to increase awareness of psychologists' expertise across the state.
    - iii. Focus efforts in identifying and building relationships with academic psychologists and focus on what may be of value to this population (e.g., community service).
    - iv. Focus efforts in targeting students and focus on what may be of value to this population (e.g., opportunities for professional development; legislative experience; mentorships; networking for post-docs)
    - v. IPA members could reach out to non-IPA members to explore why they are not IPA members.
6. Building connections, community, & engaging psychologists in Iowa (#6)
- a. Specific actions/steps to take regarding building connections, community, & engaging psychologists in Iowa
    - i. Target leadership in organizations to invite people to conferences, and identify early career psychologists who could be invited to participate actively.
    - ii. Incentivize joining committees or participating in IPA leadership positions. Consider ways to enhance committee engagement by highlighting the community connection aspect of being in a committee. Strategically recruit potential committee members during or following IPA sponsored events (e.g., Virtual Town Hall meeting; conferences/trainings).
    - iii. Enhancing communication and transparency about IPA elections and the nomination process for IPA leadership positions.
    - iv. Inform members the time commitment for committee participation does not need to be excessive. Give clear expectations of a task or a manageable set of tasks they could complete. Create job descriptions for committee participation, both chair and member expectations. Highlight that meetings are conducted via Zoom. Describe committees

and reference job descriptions in newsletter. Provide personal requests to join committees, rather than just requests within emails out to the entire membership as personal requests help people feel more wanted.

- v. Have committees outline small ways to contribute on a specific project or issues
  - vi. Consider developing a private practice committee and foster subspecialties of providers.
  - vii. Explore the creation of a consultation option on IPA's listserv for issues that come up in rural practice. This may provide more resources for psychologists in rural areas and help with consultation and mentorship.
  - viii. Identify ways to create collaborative communities for mental health providers. For example, explore ways to unite various mental health fields (e.g., psychologists, marriage, family therapists, psychiatrists, educational professionals) to advocate for common issues (e.g., telehealth/telephone services).
  - ix. Identify ways to centralize resources for psychologists living and practicing in Iowa. For example, creating local listserv may reduce a sense of isolation in rural areas, increase awareness of what services are provided in particular areas of the state, and help connect people with resources.
  - x. Use the full capabilities of the IPA website to promote connection and encourage resource sharing. The website could be used to invite conversation within circles and compile resources.
  - xi. Create additional interest groups for members (e.g., ACT SIG).
  - xii. Compile information gleaned from the listserv, such as book recommendations or information regarding other topics (possibly using website Circles).
  - xiii. Host social events for mental health providers. Have a common theme of interest to all fields and offering CE credits may enhance attendance. Request that IPA members reach out to employees/colleagues and inform them of opportunities to connect. Additionally, IPA/IPF could offer financial assistance for appetizers, etc.
  - xiv. Consider having salons for other professionals.
  - xv. Create a database of email addresses for people who are licensed in a variety of mental health organizations.
  - xvi. Consider inviting other organizations (e.g., Praxis) to partner with IPA to sponsor appropriate conferences, such as Steve Hayes, Melba Vasquez, etc.
  - xvii. IPA could take a firmer stance on issues of diversity, equity, and inclusion to encourage more diverse membership and to better support IPA members, clients, trainees, and other stakeholders.
7. Promoting the uniqueness of living and practicing psychology in Iowa (#7)
- a. Specific actions/steps to take regarding Practice in Iowa:
    - i. Differentiate objectives/goals regarding recruiting new psychologists in Iowa vs. retaining psychologists.

- ii. It may be helpful to reexamine Iowa's licensure requirements as Iowa may lose psychologists because of stringent training requirements.
  - iii. IPA could pursue lobbying efforts to promote student loan forgiveness for early career psychologists. This may help with reducing debt and provide incentives for psychologists to settle in underserved areas of Iowa.
  - iv. IPA could do a better job of connecting psychologists with open positions that are being advertised in Iowa.
  - v. Promote psychology in Iowa by having psychologists attend national conferences and serve as "ambassadors" for the state of Iowa by passing out promotional materials and brochures.
  - vi. Communicate the many advantages of living and practicing in Iowa including the cost of living, simple way of life and living in small towns, excellent healthcare, good schools, numerous outdoor activities, and emphasis on art/culture in the Iowa City area. This could be accomplished by creating a promotional video that showcases Iowa may help recruitment efforts. IPA could also increase efforts to promote Iowa on its website and Facebook pages.
  - vii. Investigate how the major universities in Iowa recruit students to their institutions. IPA could use some of the same strategies that the universities are using to attract high quality talent.
  - viii. Create a database of job listings where candidates could search for positions that are posted in Iowa. Many psychologists from outside of the state are likely not aware of the jobs and opportunities to work as a psychologist in Iowa.
  - ix. Develop an advertising campaign that would promote the quality of life and what it is like to practice in Iowa. This campaign could be targeted toward early career professionals in other states that are looking for jobs or employment.
  - x. IPA could put on additional trainings or webinar's for IPA membership (e.g., webinar for assessments and children).
8. Prescriptive authority for psychologists in Iowa (#8)
- a. Specific actions/steps to take regarding prescriptive authority for psychologists in Iowa
    - i. Advocate for legislative changes to address the board supervision barrier and address the location where trainees can receive supervision (both major barriers for trainees).
    - ii. IPA could work more collaboratively with psychiatrists on various issues.
    - iii. Create strategic initiatives for prescription privileges for the upcoming strategic plan.
    - iv. Apply for grant funding to help trainees receive the proper funding for prescription privileges.
    - v. Create a user-friendly search site where psychologists could find board-certified physicians who were willing to provide the supervision necessary for licensure.

**Appendix B:** Summary report of IPA/IDPH Survey

See link for report:

<https://www.iowapsychology.org/assets/docs/IPA%20IDPH%20Final%2005.15.2921.pdf>

## **Appendix C: Summary of Key Virtual Town Hall Themes Mapped to Organizational Themes**

*Note: The numbers represent themes identified in the Virtual Town Hall meetings.*

### **1. Education and Training**

- Improving Access to Mental Health Care (#1)
- Promoting Value and Uniqueness of Psychology (#2)
- Training of Psychologists and Engaging Students (#3)
- Business of Psychology (#4)
- Prescriptive Authority (#8)

### **2. Diversity, Equity, and Inclusion**

- Business of Psychology (stigma) (#4)
- Improving Access to MH Care (#1)
- Building Connections (#6)
- Promoting Value and Uniqueness of Psychology (#2)

### **3. Building Connections and Community**

- Business of Psychology (#4)
- Value of an IPA Membership (#5)
- Building Connections (#6)
- Promoting Uniqueness of Practicing in Iowa (#7)

### **4. Advocacy**

- Improving Access to Mental Health Care (#1)
- Business of Psychology (#4)
- Promoting Value and Uniqueness of Psychology (#2)
- Prescriptive Authority (#8)

### **5. Financial Stability**

- Promoting Value and Uniqueness of Psychology (#2)

## **Appendix D: Strategic Plan Committee Description**

Objectives: The objectives of the Strategic Plan Committee include 1) ensure development of the strategic plan; 2) provide oversight of strategic planning initiatives; 3) inform the Executive Council of current strategic planning goals, measurement of goals, and execution of goals.

### Composition of the Strategic Plan Committee:

1. The committee chair is the immediate IPA Past-President and serves a one-year term. Each term begins on January 1 and ends on December 31 of the calendar year.
2. The Strategic Plan Committee may be composed of the Presidential Triad, members of each standing committee, and may include members of special committees as appointed by the IPA President.

### Tasks:

1. Serve as a liaison between IPA standing committees and the IPA Executive Council.
2. Review strategic planning worksheets completed by IPA standing committees to ensure that committee goals align with IPA organizational themes.
3. Provide feedback and recommendations to the IPA Executive Council regarding the measurement of goals and implementation and execution of goals.
4. Oversee IPA standing committees submitting bi-monthly reports and an annual progress report.
5. Ensure that new IPA standing committees are provided with the strategic plan process and the expectation that they are to adhere to the proposed strategic plan guidelines.
6. Create summary report of all standing committee information and submit the report to the Executive Council. The report will address global progress toward goals and how committees are working toward addressing IPA organizational themes as outlined in the strategic plan.
7. Make recommendations to the Executive Council or IPA Presidential Triad regarding committees that are not making progress toward goals or if other concerns need to be addressed.
8. Provide mentorship or guidance to IPA standing committees related to concerns about not reaching goals or other committee issues that may arise.
9. The strategic plan committee will review the strategic plan every three years and make recommendations to the EC for any changes to the plan.

Committee Chair Responsibilities: The Strategic Plan Committee chair reports to the Executive Council. They are responsible for the oversight and completion of the following tasks:

1. The Chair submits an annual report to the Executive Council in April of each year.
2. During the term the Chair shall share meeting minutes with the ED for archiving.
3. Ensure that the committee meets at least quarterly throughout the year. These meetings are scheduled at the beginning of the year and can be conducted in-person or virtually.
4. Encourage recruitment of committee members that represent the various IPA standing committees.

5. Delegate tasks to committee members and ensure oversight and follow-up of these tasks for reporting to the Executive Council.



## **Appendix E: Strategic Planning Goals Worksheet Directions for Completing Strategic Planning Goals Worksheet**

Overview: The intent of the strategic plan is to provide IPA committees with a framework to guide actions and initiatives that are consistent with five organizational themes central to the mission of IPA. These five organizational themes include:

- 1) *Education and Training*
- 2) *Diversity, Equity, and Inclusion*
- 3) *Building Connections and Community*
- 4) *Advocacy*
- 5) *Financial Stability*

The key organizational themes noted above guide major goals, objectives, strategies, and tactics for the organization.

Definitions of key terms:

- *SPC*: Strategic Plan Committee
- *Themes*: Organizational “themes” are overarching themes that are central to the mission and purpose of the organization. Themes are aspirational in nature and provide a foundation for the association.
- *Goals*: “Goals” are broad intentions that guide objectives and tactics.
- *Objectives*: “Objectives” are defined as concrete, measurable actions that can be taken to achieve goals.
- *Strategies*: “Strategies” are ideas, or a set of ideas, that can be used to flesh out objectives.
- *Tactics*: “Tactics” are the specific actions that can be taken to allow strategies to be executed.

The following page is a worksheet that committees can use to create a “living document” that can be modified or edited based on the current state of the association and other changes that are taking place in the world. The SPC believes this process will allow committees the autonomy and flexibility to carry out plans for pre-existing goals and formulate new goals to meet the immediate needs of IPA and the broader community. Committee members are strongly encouraged to review the entire strategic plan before completing the worksheet. Appendix F in Strategic Plan provides examples of all completed worksheets that illustrate the framework to create goals, objectives, strategies, and tactics. It is expected that committees periodically review the Strategic Planning Goals worksheet to ensure that goals are in line with IPA organizational themes. Progress toward strategic plan goals are documented in bi-monthly EC reports.

Timeline:

- **As soon as feasible:** Newly formed committees shall complete the strategic plan worksheet with the assistance of a representative from the SPC.
- **December:**
  - Strategic Plan worksheets shall be completed/modified by the December IPA EC meeting in preparation for the following year and may be modified at any time.
  - Annual reports summarizing progress toward the strategic plan goals shall be submitted by the December EC meeting.
- **January:** The SPC will review all Strategic Plan worksheets and annual reports in January and provide feedback to committees regarding the content and implementation of strategic plans.
- **April:** The SPC will create a final report, and summary of all Strategic Plan Worksheets, that will be presented at the IPA Business Meeting at the IPA Spring Conference in April.
- **Bi-Monthly:** Submit bi-monthly progress reports for each EC meeting.

### Strategic Planning Goals Worksheet

**Committee Name:** \_\_\_\_\_

**Committee Members:** \_\_\_\_\_

**Date Created/Modified:** \_\_\_\_\_

**Committee goal:** \_\_\_\_\_

**Theme(s) related to goal:** \_\_\_\_\_

**Objective #1:**

**Strategies:** \_\_\_\_\_

**Tactics:** \_\_\_\_\_

**Tactics:** \_\_\_\_\_

**Strategies:** \_\_\_\_\_

**Tactics:** \_\_\_\_\_

**Tactics:** \_\_\_\_\_

**Objective #2:**

**Strategies:** \_\_\_\_\_

**Tactics:** \_\_\_\_\_

**Tactics:** \_\_\_\_\_

**Strategies:** \_\_\_\_\_

**Tactics:** \_\_\_\_\_

**Tactics:** \_\_\_\_\_

**Objective #3:**

**Strategies:** \_\_\_\_\_

**Tactics:** \_\_\_\_\_

**Tactics:** \_\_\_\_\_

**Strategies:** \_\_\_\_\_

**Tactics:** \_\_\_\_\_

**Tactics:** \_\_\_\_\_

**Appendix F: IPA Committee Completed Strategic Planning Worksheets**

## **Strategic Planning Goals Worksheet: Early Career Psychologist Committee (revised December 2023)**

**Committee Name:** Early Career Psychologist (ECP)

**Committee Members:** Maggie Doyle (Chair), Isaac Hooley, Mary Schenkenfelder, Jenna Paternostro, Sarah Jeglum, Christina Stai, Emily Kuhlmann

**Date Created/Modified:** March 4, 2021 (created); Dec 14, 2022 (updated)

**Committee goal:** Support ECPs financially and increase networking/connection opportunities

### **IPA Strategic Plan Themes**

- 1) *Education and Training*
- 2) *Diversity, Inclusion, and Equity*
- 3) *Building Connections and Community*
- 4) *Advocacy*
- 5) *Financial Stability*

**Theme(s) related to committee goal:** 1, 3, 5

### **Goal 1: Enhance Connection Between ECPs**

**Objective #1:** Host two social events per year.

#### **Strategies:**

- Plan social event / Routinely collaborate to plan ahead of events (such as during ECP meeting).
- Advertise using multiple modalities.
- Facilitate connection during events.

#### **Tactics:**

- Potentially schedule social event on the same night as a meeting either virtually or in person.
- Schedule social keeping in mind accessibility of ECPs across the state, such as hosting virtually or in different locations.
- Consider hosting social around another event (e.g., comedy show, sporting event, conference).
- Figure out logistics (e.g., location, food).
- Utilize ice-breakers and break into small groups to facilitate connection (if needed)
- Advertise social events on Facebook, Monday Minutes, and ECP/Member E-lists.

**Objective #2:** Strengthen membership on ECP committee.

**Strategies:**

- Each member of the committee tries to engage other ECPs on an individual level.

**Tactics:**

- Each committee member invites one or more ECPs to ECP events (e.g., meetings, socials).

**Goal 2: Support the professional development of ECPs**

**Objective #1:** Provide financial support through one or more scholarships.

**Strategies:**

- Determine the scholarship(s) to provide.
- Determine criteria for judging applications.
- Advertise using multiple modalities.
- Create subcommittee to review applications, select recipient(s), and communicate winner(s) to appropriate parties.

**Tactics:**

- Obtain money from funding source (e.g., IPF) to sponsor scholarship(s).
- Update scholarship criteria/applications as needed.
- Advertise scholarships on Facebook, Monday Minutes, and ECP/Member E-lists.
- Determine timeline for scholarships (e.g., deadlines).
- Subcommittee reviews applications, selects recipient(s) using criteria, and communicates winners to appropriate parties.

**Objective #2:** Provide professional development resources to ECPs.

**Strategies:**

- Identify and meet needs for key areas of professional development with special attention to diversity issues.

**Tactics:**

- Assess the areas of interest or needs of current ECPs by surveying ECPs (such as on FB, through E-list, meetings/events).
- Based on survey results, provide needed professional development such as maintaining resource list on the IPA ECP webpage, keeping the ECP FB page up to date, and providing training opportunities.
- Maintain ECP Resource List on IPA website (e.g., revise Resource List annually).

## IPA Membership Committee Strategic Plan 2024

Updated 11/14/2023

Alissa Doobay (Co-Chair), Nicole Keedy (Co-Chair), Ashley Banta (Student Member), Angelica Castro Bueno (Diversity and Social Justice Committee Liaison), Eric Field (APAGS Representative), Suzanne Hull (IPA Executive Director), Jennifer Paternostro, and David VanHorn

### IPA Themes

1. Education and Training
2. Diversity, Equity, and Inclusion
3. Building Connections and Community
4. Advocacy
5. Financial Stability

### Definitions

- *Themes*: Overarching themes central to the mission and purpose of the organization. Themes are aspirational in nature and provide a foundation for the association.
- *Goals*: Broad intentions that guide objectives and tactics.
- *Objectives*: Concrete, measurable actions that can be taken to achieve goals.
- *Strategies*: Ideas, or a set of ideas, that can be used to flesh out objectives.
- *Tactics*: Specific actions that can be taken to allow strategies to be executed.

### Goal 1: Enhancing Connection Between Members (Themes 2 and 3)

*Objective 1: Engage in five efforts per year to encourage member engagement in leadership positions*

#### Strategies

- Repeated calls to action using multiple modalities
- Rewards and appreciation

#### Tactics

- Executive Director routinely posts a call for joining committees and a link to the interest form in Monday Minutes
- Write thank-you email and blog post recognizing committee participants in fall or winter
- Annual year-end drawing for established (non-student) committee members, new (non-student) committee members and student committee members to win pint glass or free online recording containing up to 6 credits. Each person gets an entry for every committee on which they are a member. Review winners at the Spring Conference.
- Calls to action in agendas of MC committee meetings and EC meetings (as a reminder or other business on the EC agenda), asking members to approach people directly to request participation in leadership and committees that need members

- Seek member interest in committee/leadership participation using a standing survey linked in the new member/renewal application form
- Approach new IPA representatives to join Membership Committee
- Encourage Membership Committee members to serve as liaisons to other committees
- Maintain a list of leadership/volunteers to compare from year to year
- Ask student committee participants to encourage other students in their programs to become actively engaged in IPA, including committee participation, socials, etc.
- Utilize a “thank you for your service” and ask what led to members exiting leadership and whether they view it as a temporary or permanent break after we determine someone has left service
- List above tactics in MC Master Calendar of Responsibilities

**Objective 2:** *Collaborate with others to promote two social events per year*

**Strategies**

- Routinely collaborate with other committees (e.g., DSJ, Program Planning, ECP) to plan ahead of events
- Advertise using multiple modalities

**Tactics**

- Schedule social event during or near the time of spring and fall conferences
- Facilitate connection during events
- Advertise social events on Facebook (request WEB committee to post), Monday Minutes, and E-list posts
- Encourage Student Division Representative and Representative Elect and student committee members to organize student social events
- List above tactics in MC Master Calendar of Responsibilities

**Objective 3:** *Share information regarding membership trends and committee initiatives at least three times per year*

**Strategies**

- Maintain explicit focus on this objective in committee meetings
- Seek information regarding member accomplishments
- Take time to consider tactics for reviving award nominations

**Tactics**

- Submit 2-3 blog posts per year (including membership numbers in June, summary of MC strategic plan efforts and outcomes in December)
- Updates regarding sponsorship and mentorship programs, gratitude for committees, etc.

- List above tactics in MC Master Calendar of Responsibilities

## **Goal 2: Recruiting New Members (Themes 2 and 5)**

*Objective 4: Maintain 38% of licensed psychologists residing in Iowa as members, as measured in May.*

### **Strategies**

- Maintain updated dissemination of recruitment information and member benefits to prospect members

### **Tactics**

- Send letters to non-member new licensees each fall – summarize benefits and recent advocacy efforts
- Monitor license dates of new members for two months following the letter being sent
- Send emails to event attendees who are not members, after each event
- Request and maintain a list of testimonials for letters and blog posts
- Include a liaison to the DSJ Committee to assist in informing recruitment efforts with attention to diversity, equity, and inclusion
- Include a liaison to the ECP Committee to promote active recruitment of ECPs
- List above tactics in MC Master Calendar of Responsibilities

*Objective 5: Maintain number of student members, from May to May*

### **Strategies**

- Organize student recruitment efforts
- Manage student sponsor program
- Manage student mentor program

### **Tactics**

- Organize student recruitment meetings each fall (via Zoom if appropriate)
- Enlist members committed to serve as mentors to match number of students and interns each year with periodic E-list posts
- Pair new student members to mentors and provide Student Mentor Program description
- Document donations and number of sponsored students each year and include this information in the December EC report
- Include student members in the committee
- Seek sponsor donations each spring and as needed
- List above tactics in MC Master Calendar of Responsibilities

### **Goal 3: Retaining Members (Themes 3 and 5)**

*Objective 6: Retain 85% of members at renewal time (measured at the beginning of March)*

#### **Strategies**

- Encourage and facilitate renewals
- Continue adding and marketing values of membership

#### **Tactics**

- Contact all non-renewed members to encourage renewal, starting in February
- Utilize auto-reminders for renewal
- Remind members they will lose E-list access when dues have lapsed
- Review and update email outreach scripts to maximize marketing strategy
- Assign non-renewed outreach to a committee member they know personally, if possible
- Ask Lifetime Members to commit to their engagement in IPA each year as part of the renewal process using a survey and ask them to attest to no sanctions and potentially donate to sponsored student program
- Write Elist letter with treasurer about dues renewal process in December
- Include a liaison to the DSJ Committee to assist in informing retention efforts with attention to diversity, equity, and inclusion
- List above tactics in MC Master Calendar of Responsibilities

## **Strategic Planning Goals Worksheet: Public Education Committee (PEC) (revised November, 2023)**

**Committee Name:** Public Education Committee

**Committee Members:** Valerie Keffala, Ph.D. (Co-chair), Warren Phillips, Ph.D. (Co-chair), Barry Schreir, Ph.D. (committee member)

**Date Created/Modified:** Modified on 12/14/21; Additional modifications 5/26/22, 6/2/22, March, 2023; November, 2023

### **Committee Goal #1: Destigmatize Mental Health Issues and Seeking Help for Mental Health Issues**

**Themes:** Education and Training; Diversity, Equity, and Inclusion; Building Connections/Community; Advocacy

**Objective:** Increase acceptance of mental health as part of overall health.

**Strategy:** Through integration with other IPA committees in relevant domains, PEC will collaboratively work together to create partnerships within communities in Iowa and beyond.

- **Tactic:** The PEC will increase public knowledge of how to access mental health resources and destigmatize seeking such services (i.e., work with the Disaster Response Committee addressing public disasters, Diversity and Social Justice Committee regarding social justice issues, etc)
- **Tactic:** The PEC will engage with the community to normalize mental health concerns utilizing a variety of platforms including Op Ed articles, podcast episodes, and blog articles (approximately 6-8 messages over the course of the year)

### **Committee Goal #2: Increase accessibility of scientifically based information on psychology and mental health issues**

**Themes:** Education and Training; Advocacy

**Objective:** Distill and promote credible existing sources of information about mental health issues, well-being, and Psychology in everyday life for the public in an organized and accessible format.

**Strategy:** The PEC will provide/publish information about mental health issues, general wellbeing, and Psychology that is based on recent and up to date science on a regular basis in a variety of ways.

- **Tactic:** The PEC will strive to disseminate scholarly information on a variety of mental health issues through sharing educational and scientifically informed information in a manner that is easily digestible to the general public including:
  - Writing Op Eds to share with the general public
  - Podcasts that contain interviews with local psychologists and mental health professionals.

- Blog articles on mental health topics
- **Tactic:** The PEC will distill down complex information from relevant scientific articles and studies when sharing information with the public to increase the ability to understand and apply psychological theories and concepts into everyday life. This information could potentially be shared with other IPA committees.

**Strategic Planning Goals Worksheet: Psychopharmacology Education Committee (revised 10/17/2021)**

COMMITTEE NAME: Psychopharmacology Education Committee

COMMITTEE MEMBERS: Bethe Lonning, Chair; Katie Kopp, Lily Mathison, Ashley Norwood-Strickland, Marianna Pacheco, and Brenda Payne

DATE CREATED: 2006

COMMITTEE GOAL: To promote the training of advanced trained psychologists for prescriptive authority in Iowa

THEMES RELATED TO GOAL: Education and Training #2, 3 and 4; Building Connections and Community #3 and 4; Advocacy #1 and Financial Stability #4

OBJECTIVE #1: Ensure the law remains in place and is reviewed for possible changes on a regular basis.

Strategy: Consult with IPA Lobbyist

Tactic: Meet with lobbyist prior to legislative session to determine the viability of making any changes to the current law

Tactic: Meet with lobbyist during the legislative session if changes are put forth to determine which legislators to contact, sub committee hearings to attend and other connections as needed.

Strategy: Consult with State Advocacy Chair

Tactic: Meet prior to the legislative session to determine viability of making any changes to the current law.

Tactic: Meet with State Advocacy Chair during the legislative session if changes are put forth to determine which legislators to contact, subcommittee hearings to attend and other connections as needed.

OBJECTIVE #2: Have an MSCP degree program in Iowa.

Strategy: Maintain relationships with current APA designated programs to promote training for Iowa psychologists interested in pursuing this degree.

Tactic: Chair continue to be part of the Training Director committee

Tactic: Committee members promote all MSCP programs to IPA members through the member list and blog

Tactic: Maintain and cultivate relationship with NMSU to continue their presence in Iowa through SAU.

Strategy: Support in state universities and colleges wishing to create an MSCP program

Tactic: Provide consultation to universities trying to create a program

Tactic: Serve on boards and committee as requested by programs looking to pursue program creation.

OBJECTIVE #3: Develop training sites in Iowa for the practical portion of training.

Strategy: Create maintain a list of physicians who are willing to provide supervision and engage in collaborative practice agreements with prescribing psychologists.

Tactic: Reach out to individual physicians to determine their interest.

Tactic: Provide names of physicians who have already engaged in supervisory roles to committee chair for future potential use.

Strategy: Connect with health care entities in Iowa to determine interest in creating opportunities for prescribing psychologists.

Tactic: Reach out to primary care organizations and community health care center.

Tactic: Reach out to Indian Health Services in Iowa.

OBJECTIVE #4: Provide continuing education opportunities for prescribing psychologists in Iowa and others interested in psychopharmacology.

Strategy: Build upon relationship with NMSU

Tactic: Create agreement between NMSU and IPA to provide their coursework as CE for Iowa psychologists

Strategy: Explore other options for continuing education on a regular basis

Tactic: Provide psychologists in IPA information about courses/seminars available in RxP

Tactic: When appropriate, advertise these through IPA media to members

**Strategic Planning Goals Worksheet: Diversity and Social Justice Committee (DSCJ)  
(revised 12/31/2021)**

**Goal 1: Increase psychologists' cultural competence via educational opportunities**

**Theme Related to Goal:** Education and Training, Financial Stability, Diversity, Equity, and Inclusion

**Objective #1:** Provide three trainings (e.g., salons, workshops, retreats)

**Strategy:** Dedicate time during monthly meetings for the planning of trainings

**Tactic:** Advertise trainings on E-List, Facebook, diversity list-servs

**Tactic:** Create pamphlets, brochures, and flyers that advertise the training

**Tactic:** Advertise community events (e.g. local and national diversity lectures) to the E-List

**Tactic:** Small group Learning (e.g., townhalls)

**Goal 2: Increase members awareness of and involvement in diversity and social justice issues**

**Theme Related Goal:** Diversity, Equity, and Inclusion, Education and Training

**Objective #1:** 10-12 Diversity Spotlights, provide monthly posts to E-List

**Strategy:** Keep up with social justice happenings in the world by reading journal articles and other materials. Also, work with Diversity Liaison

**Tactic:** Have members volunteer to contribute to Diversity Spotlights, Cultural Quizzes, etc.

**Tactic:** Keep website up to date with diversity resources

**Objective #2:** Award at least one Diversity Award to a student member

**Strategy:** Promote and recognize members' involvement in diversity and social justice issues

**Tactic:** Send a call for nominations and review them

**Eligibility Requirements For Student Diversity Award**

- I. Must be an IPA student member (DSJ student members can apply)
- II. Show consistent community involvement through advocacy or volunteer work (hx of advocacy)

- III. Letter of Support from a community member that can confirm the students DEI activities within the community
- IV. Curriculum vitae

**Goal 3: Foster an inclusive and welcoming environment**

**Theme Related Goal:** Building Connections and Community

**Objective #1:** At least 3 book clubs, 2 social events

**Strategy:** Use inclusive language in posts to E-List

**Tactic:** Encourage members to share their diversity profile

**Tactic:** Collaborate with other IPA committees

**Objective #2:** Answer members' diversity-related questions

**Strategy:** Post members' de-identified diversity-related questions to the E-List

**Tactic:** Affirm members' desire for knowledge

**Tactic:** Diffuse emotional and mental labor associated with educating membership by encouraging all DSJ committee members to take turns drafting initial responses

**Tactic:** Facilitate discussion among membership on E-List

**Goal 4: Promote advocacy regarding diversity and social justice issues**

**Themes Related to Goal:** Advocacy, Diversity, Equity, and Inclusion

**Objective #1:** Offer at least 3 advocacy opportunities each year

**Strategies:** Keep abreast of DEI issues at the national and local levels

**Tactics:** Post to E-List action alerts regarding diversity issues

**Tactic:** Create and promote volunteer activities (e.g., donations to local food pantries)

**Tactic:** Monitor bill tracker and suggest action items to members as needed

## Strategic Planning Goals Worksheet 2024

**Committee Name:** Finance Committee (FC)

**Committee Members:** Sarah Fetter, PhD (Treasurer & Finance Committee Chair), Nic Holmberg, PhD (IPA Past President), Dave Beeman, PhD (IPA President), Issac Hooley (IPA President-Elect), Benjamin A. Tallman, PhD, Dan Courtney, PhD, Valerie Keffala, PhD

**Date Modified:** 11/19/2023

**Committee Goal #1:** Ensure the fiscal accountability and stability of the association

• **Theme(s) related to goal:** Financial Stability

**Objective #1:** FC meets on a monthly basis to assist the IPA treasurer in fulfilling the tasks associated with their role.

- **Tactic 1:** FC meets on a monthly basis with the treasurer.
- **Tactic 2:** FC members assist the treasurer in completing Treasurer tasks as outlined in the IPA P&P Manual.
- **Tactic 3:** FC members assist the treasurer in ensuring taxes are filed annually.
- **Tactic 4:** FC helps facilitate the transition of the treasurer every three years.
- **Tactic 5:** The treasurer, with the assistance of the Executive Director (ED), will ensure that IPA's biennial report as a non-profit organization is filed with Iowa's Secretary of State between January 1 and April 1 in odd-numbered years as required by law.
- **Tactic 6:** The treasurer will provide updated annual financial spreadsheets to the ED to maintain on the member resources section of the website.

**Objective #2:** FC assists the treasurer, on an annual basis, in creating and maintaining a balanced and fiscally conservative budget to be approved by the IPA Executive Council (EC).

- **Tactic 1:** FC prepares an initial draft of the budget to be reviewed by the EC at the October meeting. The budget is voted on by the EC at the December meeting.
- **Tactic 2:** FC assists with planning and executing IPA annual budget.
- **Tactic 3:** In collaboration with the treasurer, the FC works with committee chairs to establish budgets, contracts, or grant proposals involving IPA efforts or initiatives, to be used for the annual budget.
- **Tactic 4:** FC works with appropriate stakeholders and determines reasonable amounts for contract expenditures.
- **Tactic 5:** FC assists with recommendations for redistribution of annual excess funds according to the Budget Surplus Policy.

**Objective #3:** FC assists treasurer with annual and monthly reconciliations and oversees the work of the bookkeeper for IPA.

- **Tactic 1:** The treasurer, with the assistance of the FC, oversees the duties and responsibilities of the bookkeeper as outlined in the IPA P&P manual.
- **Tactic 2:** The FC reviews the following IPA operating account reports from the bookkeeper: monthly YTD budget; monthly balance sheet; monthly general ledger; monthly profit & loss.
- **Tactic 3:** FC provides feedback to the treasurer regarding inaccuracies in reporting and treasurer subsequently addresses such inaccuracies with the bookkeeper.
- **Tactic 4:** FC assists treasurer with drafting a Financial Policy that will outline agreed upon procedures, and be the basis for Internal Review for Financial Oversight process.

**Objective #4:** FC supports and provides guidance to IPA committee chairs, on an annual basis, for budgeting purposes.

- **Tactic 1:** FC collects and reviews all financially pertinent information, relevant to specific IPA committees, to assist with IPA committee budget planning, creation, and execution.
- **Tactic 2:** The IPA treasurer e-mails all IPA committee chairs in August for budget requests for the following year.
- **Tactic 3:** FC assists the treasurer with reviewing and providing feedback to IPA committee chairs regarding budgets. Budgetary information is then incorporated into the IPA annual budget.

**Objective #5:** FC supports the Presidential Triad/EC in the development and execution of contract budgets so that they are congruent with the organization's budgetary boundaries.

- **Tactic 1:** FC reviews contracts on an annual basis for the IPA bookkeeper, Executive Director, Director of Professional Affairs (DPA), IPA Lobbyist, and other contractors, and makes recommendations to the Presidential Triad/EC.
- **Tactic 2:** FC reviews contracts with stakeholders (e.g., speaker contracts), on an annual basis, to ensure they are congruent with IPA's annual budget.
- **Tactic 3:** Treasurer monitors and manages timely payments of contracts to IPA Bookkeeper, Executive Director, Director of Professional Affairs (DPA), IPA Lobbyist, and other contracts/contractors.
- **Tactic 4:** FC reviews Budget Surplus Policy regarding distribution of surplus funds to contractors, and makes recommendations to EC for use of the budget surplus.

**Objective #6:** FC ensures transparency and accuracy of Training Task Force (TTF) fund management.

- **Tactic 1:** FC ensures that TTF funds are separate from operating account funds.
- **Tactic 2:** The FC reviews the following IPA TTF account reports from the bookkeeper: monthly profit & loss, general ledger for TTF account.
- **Tactic 3:** Treasurer monitors and manages timely payments of TD contracts.

- **Tactic 4:** The treasurer will provide an updated annual financial spreadsheet for the TTF account to the ED to maintain on the member resources section of the website.

**Committee Goal #2:** FC promotes, researches, and explores opportunities for financial growth for IPA

- **Theme(s) related to goal:** Financial Stability

**Objective #1:** IPA actively seeks out/researches financial opportunities, including grants, to increase external funds. IPA works with internal and external stakeholders to secure grant funds.

- **Tactic 1:** FC works with appropriate committees to research public and private sector grants.
- **Tactic 2:** FC will review relevant sites (e.g., APA, NIH) for available grants on an annual basis.
- **Tactic 3:** FC and Treasurer ensure that the APA SSO grant application is submitted each fall and that the existing grant's review is submitted (by IPA President or ED) by June 1.
- **Tactic 4:** FC collaborates with appropriate committees to apply for grants in the areas of continuing education, leadership development, advocacy, training, and other areas relevant to IPA.
- **Tactic 5:** FC/IPA collaborates with IPF to secure funding for shared initiatives.
- **Tactic 6:** FC collaborates with IPA committees to explore and investigate external partnerships that benefit IPA financially. For example, the FC might collaborate with Program Planning Committee to obtain sponsorships for speakers.

**Objective #2:** FC reviews investments on an annual basis to maintain and optimize investment account returns.

- **Tactic 1:** FC reviews investment account reports and other information relevant to the IPA investment account.
- **Tactic 2:** FC periodically reviews investments to ensure that management fees are minimized and the risk-return balance is consistent with IPA's mission/investment strategy as a non-profit organization.
- **Tactic 3:** The treasurer/FC seeks consultation with the investment broker annually and as needed.
- **Tactic 3:** FC reviews the investment account policy for using investment account funds (included in the IPA P&P manual) on an annual basis.
- **Tactic 4:** The FC will make recommendations of the purpose and objectives for IPA's investment account, as part of the drafting of the Financial Policy. This statement will help clarify the nature of the investment account and provide guidelines for investment account management.

## 2024 Strategic Planning Goals Worksheet: Strategic Plan Committee (SPC)

**Date Created/Modified** (Modified on 10/29/2023)

**Committee Name:** Strategic Plan Committee (SPC)

**Committee Members:** Nicole Keedy, PhD (Chair); Nicole Holmberg, PhD; Valerie Keffala, PhD, ABPP; Alissa Doobay, PhD; Benjamin Tallman, PhD

**Themes:**

- 1) *Education and Training*
- 2) *Diversity, Equity, and Inclusion*
- 3) *Building Connections and Community*
- 4) *Advocacy*
- 5) *Financial Stability*

**Goal #1:** Strategic Plan Committee (SPC) provides written comprehensive annual report to Executive Council (EC) in April and to membership at business meeting in April.

**Theme(s) related to goal:** *Education and training; Diversity, Equity, and Inclusion, Building Connections and Community; Advocacy; and Financial Stability.*

- **Tactic:** SPC Chair ensures all SPC members have access to the IPA Standing Committee (SC) reports. The format of reports should incorporate information from strategic planning worksheets.
- **Tactic:** SPC communicates about timelines and provides feedback and reminders to IPA SC's about annual report and updated annual Strategic Plan Worksheet. The final SC reports will be due before the December EC meeting and may serve as the December report to the EC.
- **Tactic:** SPC meets in early in the year to review reports and create a synthesized document of all SC reports.
- **Tactic:** The SPC presents a final report for the April EC meeting and the Business meeting.
- **Tactic:** The SPC sends the text of the final report in an email to the Elist following the Business Meeting.

**Goal # 2:** SPC reviews IPA SC's annual reports and monitors bimonthly EC reports to ensure the reports adhere to strategic plan guidelines.

**Theme(s) related to goal:** *Education and training; Diversity, Equity, and Inclusion, Building Connections and Community; Advocacy; and Financial Stability.*

- **Tactic:** SPC reviews EC reports and annual reports from IPA SC's.
- **Tactic:** SPC provides reminders and timeline to SC's to complete annual reports.
- **Tactic:** SPC stores all reports in electronic files accessible to all IPA SPC and SC members (e.g., dropbox).
- **Tactic:** SPC meets in the fall to coordinate preparing SC's for submitting their updated strategic plan worksheets and annual reports.
- **Tactic:** SPC provides a handout to all IPA SC chairs annually that describes the strategic plan process, timeline, and expectations. This handout reminds committees that the SP worksheet should be updated/completed at the end of the year along with annual report. The handout also requests committees to review and provide updates for their P&P descriptions. This ensures that committees start each calendar year with a plan and updated committee description in place.
- **Tactic:** In addition to committee annual reports, the SPC seeks an annual report from the Advocacy Team, Director of Professional Affairs (self-evaluation from the fall, updated as desired), Training Director (provide copy of mid-year report typically produced in January), and Diversity Liaison summarizing accomplishments for the year.
- **Tactic:** SPC ensures that new SC's are provided with the strategic plan process.
- **Tactic:** SPC encourages committees to embrace all of IPA's Organizational Themes.
- **Tactic:** SPC highlights areas where committees may create liaisons for better communication with other committees.
- **Tactic:** SPC provides Membership Committee with highlights that may be beneficial to include in marketing materials.
- **Tactic:** SPC provides feedback to IPA SC's about their progress toward strategic plan goals.
- **Tactic:** SPC reviews all committee EC reports. If SPC members develop concerns regarding the progress of specific committees, they arrange a meeting to discuss how to address their concerns.

**Goal #3:** The SPC reviews the strategic plan every three years and makes recommendations to the EC for any changes to the plan.

**Theme(s) related to goal:** *Education and training; Diversity, Equity, and Inclusion, Building Connections and Community; Advocacy; and Financial Stability.*

- **Tactic:** In 2023 the SPC will begin planning for potential updates to the strategic plan by reviewing the strategic planning process, procedures, and progress made toward strategic plan initiatives.

- **Tactic:** In 2023 the SPC will seek input from IPA members regarding the overarching Strategic Plan.
- **Tactic:** The SPC will seek input from committees regarding the current Strategic Plan Worksheet process.
- **Tactic:** Based on the SPC's review of the strategic plan process the SPC can make recommendations to collect or gather information from multiple stakeholders (e.g., IPA members and non-members) using various methods (e.g., survey, virtual town hall meeting, etc.). The committee may wish to repeat the IDPH survey that was completed in 2020 in 2025/6 for comparison.

**Goal #4:** The SPC (and/or a workgroup coordinated by the SPC) reviews the IPA Policy and Procedures (P&P) Manual/IPA By-laws on an annual basis and makes recommendations to the EC for any changes to the manual.

- **Tactic:** The SPC reviews the IPA P&P Manual/IPA By-laws on an annual basis and recommends edits/revisions. This should be accomplished on an annual basis and revisions/edits should be presented to and voted on at EC meetings.
- **Tactic:** The SPC coordinates review of the P&P manual and Bylaws.
- **Tactic:** The SPC will request that each section in P&P manual is reviewed by the appropriate member of IPA leadership.
- **Tactic:** The SPC will review and evaluate suggested edits brought forth by IPA leadership to align with the strategic plan.
- **Tactic:** The SPC will update the P&P manual to reflect changes.

## Program Planning Committee (PPC) Strategic Planning Goals Worksheet 2024

**Committee Members:** Nicole Keedy, PhD (PPC Co-Chair; IPA Past President); Nicole Holmberg, PhD (PPC Co-Chair; IPA President); David Beeman, PhD (PPC Co-Chair, President Elect); Suzanne Hull (IPA Executive Director); Sarah Fetter, PhD (IPA Treasurer); Kevin Krumvieda, PhD (IPF Liaison)

**Date Created/Modified:** November 7, 2023

### IPA Strategic Plan Themes

- 1) Education and Training
- 2) Diversity, Equity, and Inclusion (DEI)
- 3) Building Connections and Community
- 4) Advocacy
- 5) Financial Stability

### **GOAL 1: PROVIDE QUALITY CONTINUING EDUCATION OPPORTUNITIES FOR IPA MEMBERSHIP**

Theme(s) related to goal: Education and Training, DEI, and Financial Stability

#### **Objective 1: Plan annual Spring (12 CEs – In Person) and Fall (3 CE - Virtual) Conferences**

Strategy: Cover topics of current relevance to most psychologists

Tactics:

- Seek topic suggestions in program feedback forms and export for review annually
- Keep a running list of member-requested topics without topics presented in the past two years
- Keep an ongoing list of presentations provided in PPC electronic shared (e.g., dropbox) file

Strategy: Ensure diversity and inclusivity is considered in all aspects of conference planning

Tactics:

- Consider prioritizing invitations to speakers who are from underrepresented groups as a way of using IPA's power to center diverse voices
- Ensure trainings are provided in varied locations
- Be mindful of ADA-compliance
- Have pronouns printed on conference name tags/badges

Strategy: Begin preparations for each conference at least 12 months in advance

Tactics:

- Keep a calendar (Triad Master Calendar) with benchmarks indicating when various aspects of planning tasks should ideally be started and completed
- Maintain a list of past events and all related fees to assist with speaker and location contract negotiations

Strategy: Maintain traditional meeting-affiliated communications to members

Tactics:

- Collaborate with the Triad regarding scheduling of the annual business meeting in the spring (during lunch, evening of first day of conference, or virtually)
- Formally recognize exiting Executive Council members during the spring Awards Ceremony
- Formally recognize recent IPA Spring Award recipients (IPA Service Award, Phil Laughlin Meritorious Achievement Award, IPA Diversity Leadership Award, and DEI Student Service Award from the DSJ Committee)
- Recognize recent IPA Fall Award recipients (Michele Greiner ECP Award and Ann Ernst Public Service Award)

Strategy: Express gratitude following events

Tactics:

- President sends thank you message to each presenter for Spring, Fall, and Ethics Conferences
- CE Proposal form includes a reminder to proposing committee to thank the presenter

## **Objective 2: Plan Ethics Conference in odd years (opposite DSJc Multicultural Workshop)**

Strategy: Collaborate with The Trust for hosting and sponsorship, if possible

Tactics:

- Keep track of content sequence
- Contact The Trust in summer of preceding year to arrange date, location, and content
- Send “save the date” to membership as early as possible

## **GOAL 2: EXPAND ACCESS TO CE OPPORTUNITIES**

Theme(s) related to goal: Education and Training, DEI, Financial Stability

### **Objective 1: Approve up to 35 CEs per year**

Strategy: Approve CE opportunities proposed by standing committees

Tactics:

- Communicate to standing committees that PPC approval of proposed CE training will be granted pending: 1) the training aligns with mission of IPA; 2) training does not overlap with previously approved and scheduled trainings (i.e., one training per month); 3) all funding necessary for training comes from standing committee budget and/or sponsorship that the committee has secured; 4) arrangements for proposed training will be made by the proposing standing committee(s) and Executive Director; 5) training would not put total CE count beyond 35 in a calendar year
- Direct committees/leaders to the CE training proposal form on the website
- Review and decide as a committee whether to approve proposed trainings

## **Objective 2: Utilize technology to expand member access to trainings**

Strategy: Offer a combination of in-person and virtual trainings, if possible

Strategy: Routinely ask all presenters about recording their presentations

Tactics:

- Make recorded trainings available for members via IPA website
- Utilize closed captioning for recorded trainings, when possible

## **GOAL 3: PROMOTE COMMUNITY BUILDING THROUGH CE OPPORTUNITIES**

Theme(s) related to goal: DEI, Building Connections and Community

### **Objective 1: Provide opportunities for conference attendees to interact with one another**

Strategy: Consider asking IPA members to present at conferences

Strategy: Build into conference itineraries time for attendees to mingle (e.g., meeting-free meals, social hours)

Strategy: Support committee and/or IPF ideas promoting relational activities

Tactics

- Communicate general timeline for finalizing items for the itinerary to Membership Committee, ECP Committee, and IPF liaison

### **Objective 2: Disseminate information from leadership at each conference**

Strategy: Provide announcements (e.g., upcoming events, reminders of membership

benefits) at each CE training

Tactics:

- Current PPC chair makes announcements at Spring, Fall, and Ethics Conferences
- PPC chair communicates information to be announced by committee co-/chair at standing committee proposed CE trainings throughout the year
- Facilitate time requests by IPF to make announcements

### **Objective 3: Involve students in CE opportunities**

Strategy: Include opportunities to support students at PPC CE events, if possible

Tactics:

- Consider soliciting student research presentations/poster sessions
- Send call for presentations to instructor email list, as relevant
- Consider soliciting intern poster sessions via Iowa training programs
- Consider which events to offer free student registration and which to offer reduced student registration rates

## **GOAL 4: MOTIVATE MEMBERS TO PARTICIPATE IN PPC CE TRAININGS**

Theme(s) related to goal: DEI, Building Connections and Community, Financial Stability

### **Objective 1: Limit CEs to 35 per year to promote maximum attendance at each training**

### **Objective 2: Market CE trainings strategically**

Strategy: Market to non-psychologists, as relevant

Tactics:

- Consider marketing to other mental health disciplines and healthcare disciplines, as relevant

Strategy: Ensure effective brochure design and content

Tactics:

- Utilize eye-catching colors and design
- Review brochure proofs carefully and request any edits necessary, keeping in mind mailing costs

Strategy: Be timely with marketing efforts

Tactics:

- Send “save the date” notices via e-list ideally no later than 9 months before in-person events and 6 months before online events

- Mail brochures ideally no later than 6 months before in-person events and 4 months before online events
- Ensure registration is open well in advance
- Send event reminder notices via e-list (e.g., Monday Minute)

## **Updated Strategic Plan Worksheet (for 2024)**

### **WEB Committee**

#### **Community building online – Goal 1, Themes 2, 3, 4, 5:**

***Objective 1:** Leverage IPA members via E-List to write 20 engaging blog posts per year*

***Objective 2:** Ensure The Iowa Psychologist (TIP) content continues in blog post form and is disseminated via the E-List*

- New blog entries are highlighted weekly in the Monday Minute. Previous features of the TIP (e.g., Presidential Update, advertising) are included on the blog.

#### **Awareness and dissemination of information to members - Goal 2, Themes 1, 2, 3, 4, 5:**

***Objective 1:** Implement initiatives to disseminate information to members*

- Ongoing maintenance of membership tools: referral sources, CE tracker, by-laws, manuals, member lookup, etc. via the Member Resources Page
- Showcasing the personal and professional contributions of IPA members with information relevant to IPA and its members via the blog
- Dissemination of information to members via E-List and Monday Minute
- Dissemination of information to members via Blog
- WEB Committee posts updates to IPA Private FB Group

#### **Website maintenance, updates, and oversight – Goal 3, Themes 1, 2, 3, 5:**

***Objective 1:** Conduct biennial (odd years) review of website user-friendliness and share out in EC report*

- Conduct a website audit in odd years by May
  - Identify a committee member to conduct an annual audit of website functionality as both a member and non-member to identify inaccuracies on both desktop and mobile devices

- Identify a committee member to conduct an annual audit of website functionality as both a member and non-member to identify user-experience issues on both desktop and mobile devices
  - Biennial review best practices surrounding website accessibility
- Ongoing: Respond to concerns that the WEB committee or other members identify as they arise
  - Annually remind committee chairs and leaders to review website content relevant to their committee and to offer updates as needed
  - Responding to member inquiry regarding website accessibility features and if anyone may need them (e.g., enlarged type, increased line spacing, dyslexia friendly fonts, contrast).

## 2024 Strategic Planning Worksheet Disaster Response Committee (DRC)

**Committee Members:** Ashley Freeman, Ph.D. (Chair), Valerie Keffala, Ph.D. (IPA Past President; Program Planning Committee Co-Chair; Public Education Co-Chair), Sarah Fetter, Ph.D. (IPA Treasurer and Finance Committee Chair), Emily Thomas, Ph.D., Tess Filip (IPA Student Member)

**Date Created/Modified:** 10/30/2023

### IPA Strategic Plan Themes:

- 1) *Education and Training*
- 2) *Diversity, Equity, and Inclusion*
- 3) *Building Connections and Community*
- 4) *Advocacy*
- 5) *Financial Stability*

**Committee Goal 1: Serve as a resource for IPA when disasters occur and respond appropriately to disasters impacting Iowa communities or IPA members**

*Theme(s): (1) Education & Training, (2) Diversity, Equity, and Inclusion, (3) Building Connections & Community, (4) Advocacy*

**In the event of a disaster, the DRC will follow the following steps:**

### **Step 1 : Identify disaster-related event has occurred**

- Criteria for disaster-related events that could prompt a response from the DRC or IPA:
  - Disaster events directly affecting communities in Iowa or IPA members with a primary focus on events occurring in Iowa
  - Disaster events occurring outside of Iowa that impact IPA members or Iowa residents when appropriate and feasible
- **Step 2: Coordinate with relevant IPA committees and community agencies when appropriate**

- Coordinate with relevant IPA committees (e.g., Public Education, DSJ, WEB, etc.) to determine appropriate course of action when appropriate.
- Communicate with relevant community agencies (e.g., Red Cross, Iowa DBHRT, Region VII Disaster Response Ecosystem) when appropriate.
- Reach out to other SPTAs to coordinate appropriate disaster response or to request support if a disaster occurs in Iowa when appropriate.
- In the event of a disaster impacting the essential functioning of IPA:
  - Consult IPA Crisis Management Plan when appropriate.
  - Serve as a resource for IPA and consult with IPA's Executive Director as well as the Triad when appropriate.
  - The DRC Chair(s) may be asked to serve on an Ad Hoc Crisis Management Committee.
- **Step 3: Determine type of response necessary and respond appropriately**
  - The DRC aims to respond in a timely manner to disasters directly impacting IPA members and/or Iowa communities and involving significant damage to property or loss of life.
  - The Chair/Co-Chairs will be responsible for initiating the response plan. However, should they be indisposed, a request will go out to the DRC Committee asking if someone else could take over.
  - Attempts will be made to consider cultural and community-level factors when determining appropriate disaster response efforts.
- **Tactic 1: Inform membership a disaster has occurred**
  - Communicate details of the disaster event to membership through the following:
    - Provide links to articles from reputable news sources.
    - Articles shared may include details on location, number of people affected, and possible psychological impact of the disaster event.
    - DRC will consider relevant cultural and community-level factors when sharing disaster-related information.
- **Tactic 2: Communicate disaster-response resources to members**
  - If resources are already available in the DRC Resource List on IPA's website, send the Resources link to membership via an email to the IPA E-List. Additional communication options could include:
    - Post to the IPA Blog
    - IPA Public Facebook page
    - The Public Education Committee could choose to share resources sent out by the DRC with the public if deemed appropriate.
  - If resources specific to the current event are not already on IPA's website, DRC will compile and communicate resources to membership, when appropriate. In

addition, the DRC Committee will consider adding relevant resources to the disaster resource list on IPA's website.

- DRC will consider relevant cultural and community-level factors when sharing disaster-related resources.
  - DRC may choose to write or ask a member to write a blog post on a related disaster event.
  - Forward any relevant emails from APA related to disaster-related volunteer opportunities.
- **Tactic 3: Offer support to IPA members**
    - When appropriate and available, offer group video support meetings for members to process the impact of the disaster on their personal and professional lives.
    - When information about a disaster is sent to the IPA E-List, invite members to inform the DRC Committee of any members needing support.
- **Step 4: Communicate disaster response volunteer opportunities to IPA membership**
    - Forward appropriate requests for support from other organizations to membership
    - When appropriate, utilize the IPA member directory to identify members with disaster-related training.
    - When feasible and appropriate, coordinate with the Public Education Committee regarding communicating disaster response opportunities to the public.
    - Forward any relevant disaster-related volunteer opportunities to IPA E-List.
  - **Step 5: Maintain list of all disaster events the has DRC responded to**
    - Include description of the event, date of the event, response date and actions taken in response to the event.
  - **Step 6: Reflect and evaluate DRC disaster response process**

## **Committee Goal 2: Educate IPA membership on Disaster Mental Health**

*Theme(s): Building Connections & Community; Education and Training; Diversity, Equity, and Inclusion*

### **Objective 1: Educate IPA members on disaster mental health**

#### **Tactic 1: Educate IPA members on important disaster-related topics**

- Maintain Disaster Resource List on IPA website.
  - Review and revise Disaster Resource List as needed.
  - 2024 goals for the resource list include:

- Review DEI resources and add to Disaster Resource list.
- Review Officer-Involved Shooting resources and add to list.
- If relevant and appropriate, publish a blog post on relevant disaster events.
- If relevant and appropriate, inform members of disaster-related advocacy opportunities.

**Tactic 2: Inform IPA members of disaster-related training opportunities**

- Communicate already-existing disaster-related trainings to membership.
- Consider co-sponsoring disaster-related trainings offered by CESPPA.

**Objective 2: Inform IPA members of disaster-related volunteer opportunities**

- **Tactic:**
  - Communicate disaster-related volunteer opportunities to membership as we become aware of them.
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