

IPA 2021-2024 Strategic Plan (revised 01/26/2022)

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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 2nd, 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 19th, 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 8th, 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 21st, 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 21st, 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 21st, 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 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 SCP 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 SCP 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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***Special thanks to Dr. Shannon De Clute and Mr. Christopher Anders for assisting with the creation of the IPA/IDPH survey. Special thanks to Dr. Ashley Freeman for editing the Strategic Plan document.*

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

Appendix E: Committee Completed Strategic Planning Worksheets

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 09/26/2021)

Committee Name: Early Career Psychologist (ECP)

Committee Members: Maggie Doyle (Chair), Ashley Freeman, David Paul, Danah Barazanji, Hannah Ottmar, Isaac Hooley, Jessica Miller-Lange

Date Created/Modified: March 4, 2021 and June 7, 2021

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:

- Schedule social event on the same night as a meeting either virtually or in person
- 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

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 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

Strategic Plan Goals Worksheet: Membership Committee (revised 12.31.2021)

Alissa Doobay (Co-Chair), Nicole Keedy (Co-Chair), Karen Nelson, Eric Field, and Suzanne Hull (IPA Executive Director)

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: Net gain of 3 people in leadership (EC, committee members/chairs, and other volunteer positions) by December 31, 2022

Strategies

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

Tactics

- Executive Director routinely posts link to job descriptions in Monday Minutes
- Assist in creation of committee E-lists, as needed – doubles as a method for tracking current committee members
- Write thank-you email and blog post recognizing committee participants in fall or winter issue
- Annual year-end drawing for established and new committee members to win pint glass or free online recording containing up to 6 credits
- Calls to action with link to committee job descriptions annually posted to Facebook group
- 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 in the new member/renewal application form
- Maintain a list of leadership/volunteers to compare from December 2021 to December 2022
- List above tactics in MC Master Calendar of Responsibilities

Objective 2: Host two conference 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
- Utilize ice-breakers and break into small groups to facilitate connection
- Encourage APAGS rep and student committee members to organize student social events
- List above tactics in MC Master Calendar of Responsibilities

Objective 3: Share information of member interest approximately bimonthly

Strategies

- Maintain explicit focus on this objective in committee meetings
- Seek information regarding member accomplishments

Tactics

- Submit 2-3 blog posts per year (including membership numbers in June, summary of MC strategic plan efforts and outcomes in December)
- Include call for people to offer kudos in the Monday Minutes: “elevate your peer or yourself” by posting IPA member accomplishments or media involvement to the E-list, emailing a co-chair, or posting to Facebook group
- Nominate at least one award recipient per year - review awards that have been announced, and possible nominees, in MC meetings
- Discuss potential blog posts in MC meetings

- List above tactics in MC Master Calendar of Responsibilities

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

Objective 4: Increase number of new full members, from May to May, by 2%

Strategies

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

Tactics

- Standardize an informational letter summarizing benefits
- Customize letters with recent advocacy efforts for each mailing
- Send letters to non-member new licensees each fall
- Send emails and letters to event attendees who are not members, after each event
- Request and maintain a list of testimonials for letters and blog posts
- List above tactics in MC Master Calendar of Responsibilities

Objective 5: Increase number of student members, from May to May, by 2%

Strategies

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

Tactics

- Organize intern and 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
- 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: *Decrease number of non-renewed members by May 1, 2022 (compared to same number in 2021) by 2%*

Strategies

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

Tactics

- Contact all non-renewed members to encourage renewal, starting March 1
- 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
- Assist in highlighting member value through E-list, Facebook, and blog posts
- Write Elist letter with treasurer about dues renewal process in December
- List above tactics in MC Master Calendar of Responsibilities

Strategic Planning Goals Worksheet: Public Education Committee (PEC) (revised 12/14/2021)

Committee Name: Public Education Committee

Committee Members: Amanda Johnson, Ph.D. (Co-chair), Warren Phillips, Ph.D. (Co-chair)

Date Created/Modified: Modified on 12/14/21

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 by partnering with community organizations that address health and well-being in diverse and inclusive ways.

Strategy: The PEC will reach out to community organizations throughout Iowa who support health and well-being in a variety of ways to explore possibilities of partnership.

- **Tactic:** The PEC will discuss the possibility of partnership with the YMCA to determine what manner of relationship would be acceptable and productive for both organizations
- **Tactic:** The PEC will discuss the possibility of partnership with American Heart Association to determine what manner of relationship would be acceptable and productive for both organizations
- **Tactic:** The PEC will discuss the possibility of partnership with Employee Family Resources to determine what manner of relationship would be acceptable and productive for both organizations
- **Tactic:** The PEC will discuss the possibility of partnership with Unitarian Universalist Fellowship to determine what manner of relationship would be acceptable and productive for both organizations

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 easy to access format

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

- **Tactic:** The PEC will strive to share information on a variety of mental health issues through articles written in the PsyBlog on a monthly basis.
- **Tactic:** The PEC will sponsor presentations on mental health issues and general wellbeing by professionals in the field offered to the public through Eventbrite (for ease of registration and dissemination) or by other means.
- **Tactic:** The PEC will share information with the public about a variety of psychological concepts and theories, regarding current issues, through podcasts that contain interviews with local (or national) psychologists and mental health professionals.
- **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.

Committee Goal #3: Increase awareness of how and where to access affordable and diverse and inclusive mental health services in Iowa for the public

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

Objective: Provide accurate and timely information about how and where to access affordable and diverse and inclusive mental health services to the public in an organized and easily accessible format

Strategy: The PEC will publish/provide information to the public about how and where to access affordable, diverse, and inclusive mental health services in Iowa on a regular basis in a variety of ways

- **Tactic:** The PEC will share information with the public about how/where to access affordable, diverse, and inclusive mental health services through articles written in the PsyBlog
- **Tactic:** The PEC will share information with the public about how/where to access affordable, diverse, and inclusive mental health services through podcasts shared with the public across multiple platforms including Google podcast and Spotify, as shared through social media posts from IPA members to their individual social media accounts and on the IPA facebook account
- **Tactic:** The PEC will share information with the public about how/where to access affordable, diverse, and inclusive mental health services through presentations to the public hosted with Eventbrite (for easy registration), or by

other means, and as posted through social media posts from IPA members to their individual social media accounts and on the IPA facebook account

Committee Goal #4: Increase understanding of the value of Psychology and Mental Health services (both from a quality of life and financial perspective)

Themes: Education and Training; Building Connections/Community; Advocacy

Objective: Share scientifically based information about Psychology and mental health issues in a variety of formats to a wide variety of groups including medical community, workplace employers, educational institutions, insurance companies, and others.

Strategy: The PEC will seek, publish, and share information about the value of Psychology and mental health services with a variety of professional and non-professional audiences using multiple methods.

- **Tactic:** The PEC will actively seek appropriate opportunities to share information with the medical community, employers, educational institutions, insurance companies, and others about the value of psychology and mental health services.
- **Tactic:** The PEC will share information concerning the value of Psychology and Mental Health services (both from a quality of life and financial perspective) in a variety of ways including in our authored materials, speaking engagements, blog posts, podcasts, and other PEC communications.
- **Tactic:** The PEC will create materials about the value of psychology and mental health services and make them available to IPA members to share with their various communities and groups.

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

COMMITTEE NAME: Psychopharmacology Education Committee

COMMITTEE MEMBERS: Beth 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: Finance Committee (FC)
(revised 01/25/2021)

Committee Name: Finance Committee (FC)

Committee Members: Sarah Fetter, PhD (Treasurer & Finance Committee Chair); Nicole Keedy, PhD (IPA President), Nic Holmberg (IPA President-Elect), Valerie Keffala, PhD (IPA Past President), Jennifer Kauder, PhD, Benjamin A. Tallman, PhD, Dan Courtney, PhD, Mark Poeppe, PsyD

Date Created/Modified: 1/25/2022

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.

Strategy #1: FC supports and provides feedback to the treasurer.

- **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. The outgoing treasurer will facilitate a meeting with IPA's account representative at Hills Bank and the incoming treasurer.
- **Tactic 5:** The treasurer, with the assistance of the FC and 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, with the assistance of the FC, 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 voted on and approved by the IPA Executive Council (EC).

Strategy # 1: FC collects and reviews all financially pertinent information to assist with budget planning, creation, and execution.

- **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.

Strategy #1: The FC and treasurer obtain and review annual and monthly financial reports from the IPA bookkeeper.

- **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 an Internal Review for Financial Oversight policy.

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

Strategy #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 1:** The IPA treasurer e-mails all IPA committee chairs in August for budget requests for the following year.
- **Tactic 2:** FC assists the treasurer with communicating to IPA committees regarding funds that may be available to them the following fiscal 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.

Strategy #1: FC collects and reviews all financially pertinent information related to contract budgets.

- **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 old and new contracts with stakeholders (e.g., presenter contracts for continuing education), on an annual basis, to ensure they are congruent with IPA's annual budget.
- **Tactic 3:** FC and treasurer monitor and manage timely payments of contracts to IPA Bookkeeper, Executive Director, Director of Professional Affairs (DPA), IPA Lobbyist, and other contracts/contractors.

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

Strategy #1: FC collects and reviews all financially pertinent information related to TTF.

- **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:** FC reviews TD contract on an annual basis and makes recommendations to the President Triad/EC regarding any changes.
- **Tactic 4:** FC and treasurer monitor and manage timely payments of TD contracts and works with IDPH to facilitate such payments.
- **Tactic 5:** The treasurer, with the assistance of the FC, 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.

Strategy #1: 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. (send email to committees each January)
- **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 APAPO grant application is submitted each fall and that the existing grant's review is submitted (by the current IPA President) by June 1.
- **Tactic 3:** 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 4:** FC/IPA collaborates with IPF to secure grant funding for shared initiatives. FC/IPA will reach out to IPF each January for this purpose.
- **Tactic 5:** IPA organizes and executes a fundraising “Day for Psychology” event, on an annual basis, in the fall. The FC supports this endeavor and the ED/Presidential Triad will seek support from the treasurer/FC if needed.
- **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.

Strategy #1: FC reviews investment account reports and other information relevant to the IPA investment account.

- **Tactic 1:** The treasurer/FC seeks consultation with the IPA financial advisor on a biannual basis and as appropriate.
- **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:** 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 explore the creation of a “statement of purpose” for IPA’s investment account. This document will help clarify the nature of the investment account and explore potential consequences of any changes to the account for the organization (e.g., if investments make too much money, if funds are regularly withdrawn to fund initiatives, etc.).

Strategic Planning Goals Worksheet: Strategic Plan Committee (SPC)
(revised 11.17.2021)

Date Created/Modified (Modified on 11/17/2021)

Committee Name: Strategic Plan Committee (SPC)

Committee Members: Benjamin Tallman, PhD (IPA Past President); Valerie Keffala, PhD; (IPA President); Nicole Keedy, PhD (IPA President Elect and Membership Co-Chair); Matt Cooper, PsyD (IPA Training Director); Alissa Doobay, PhD (IPA Membership Co-Chair); Joy Goins-Fernandez, PhD (IPA Diversity and Social Justice Co-Chair; IPA Diversity Liaison).

Themes:

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

Committee Goal #1: Provide oversight of the strategic planning initiatives using SP Worksheet.

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

Objective #1: Strategic Plan Committee (SPC) provides written comprehensive annual report to Executive Council (EC) in February (2022) and membership at business meeting in April (2022).

Strategy: SPC oversees communication and reporting about the strategic planning process.

- **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. 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 2022 to review reports and create a synthesized document of all SC reports.
- **Tactic:** The SPC presents a final report to the EC before the 2022 Business Meeting.
- **Tactic:** The SPC presents a final report at the 2022 Business meeting.

Objective # 2: SPC reviews IPA SC's annual reports, as well as bimonthly EC reports at SPC quarterly meetings, to ensure the reports adhere to strategic plan guidelines.

Strategy: SPC collects 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 review bi-monthly reports and meets in January, in preparation for the EC meeting, and July- mid-year meeting; Schedule additional meetings as needed.
- **Tactic:** SPC reviews annual EC reports from SC's to ensure completion. Annual reports are due for the December EC meeting.
- **Tactic:** ED to place bi-monthly committee reports in the SPC electronic file.
- **Tactic:** SPC reminds committees that the SP worksheet should be updated/completed on an annual basis at the end of the year (along with annual report). This ensures that committees start each calendar year with a plan in place.
- **Tactic:** SPC ensures that new SC's are provided with the strategic plan process.
- **Tactic:** SPC develops a handout to provide new IPA SC chairs that describes the strategic plan process, timeline, and expectations.

Strategy: SPC provides feedback to IPA SC's about their progress toward strategic plan goals.

- **Tactic:** SPC provides written feedback to committees, during the first quarter of the year, regarding the annual report/strategic plan worksheet completed the prior year. Providing feedback early in the year will allow committees to incorporate feedback into their plans.
- **Tactic:** SPC reviews EC reports on a bi-monthly basis and provides written feedback to support, connect, and commend IPA SC's as appropriate.

Committee Goal #2: Ensure development, maintenance, and reevaluation of the Strategic Plan and IPA Policies and Procedures.

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

Objective #1: The SPC reviews the strategic plan every three years and make recommendations to the EC for any changes to the plan.

Strategy: Use multi-method approach to gather information to review past strategic plan and initiatives to inform future strategic planning.

- **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:** Based on the SPC's review of the strategic plan process the SPC can recommend 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.).

Objective #2: The SPC reviews the IPA Policy and Procedures (P&P) manual on an annual basis and makes recommendations to the EC for any changes to the manual.

Strategy: The SP process may inform changes or revisions to the IPA P&P Manual.

- **Tactic:** The SPC reviews the IPA P&P Manual 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.

**Strategic Planning Goals Worksheet: Program Planning Committee (PPC)
(revised 10/28/2021)**

Committee Members: Valerie Keffala, PhD (IPA President); Benjamin Tallman, PhD (IPA Past-President); Nicole Keedy, PhD (IPA President-Elect); Kevin Krumvieda, PhD (IPF Liaison); Jennifer Kauder, PhD (IPA Treasurer); Joy Goins-Fernandez, PhD (IPA Diversity Liaison; Co-Chair of Diversity and Social Justice Committee); Suzanne Hull (IPA Executive Director)

Date Created/Modified: October 28, 2021

IPA Strategic Plan Themes

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

Committee Goal 1: Provide quality training and programming for IPA membership

Theme(s) related to goal: 1, 2, 5

Objective 1: Select topics and locations reflecting member interests

Strategy 1: 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 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
- Avoid repeating topics in a two-year cycle unless part of a training sequence
- Ensure presenters are familiar with and agree to meet standards for Iowa CEs as specified in IAC 241.3(2) by including code language in contracts
- Send annual 3-item survey to membership on E-list requesting topics and locations of member interest (one open-ended question and one rank-order suggestions list based on the running list of requested topics)
- PPC discusses relevant topics to reach consensus about programming

Strategy 2: Arrange convenient locations

Tactics

- Keep a running list of training locations and review last few years to diversify locations and maximize access by members
- Ensure trainings are provided in varied locations

Objective 2: Organize a two-day conference each spring, granting 12 CEUs

Strategy 1: Maintain traditional meeting-affiliated communications to members

Tactics:

- Schedule annual business meeting at spring conference
- Formally recognize exiting Executive Council members during business meeting
- Formally recognize recent IPA award recipients (IPA Service Award, Phil Laughlin Meritorious Achievement Award, and DEI Student Service Award from the DSJ Committee)
- Coordinate with IPF regarding a spring fundraiser at the conference

Strategy 2: Include student-supporting programming, if possible

- Consider soliciting student research presentations
- Send call for presentations to instructor email list, as relevant
- Explore student member network opportunities to organize in conjunction with Membership Committee

Strategy 3: Include 3 ethics CEUs meeting Iowa requirements, if possible

- Discuss ethics opportunities on an annual basis
- Recognize potential ethics opportunities in existing programming to offer

Objective 2: Organize a one-day conference each fall, granting 6 CEUs

Strategy 1: Maintain traditional meeting-affiliated communications to members

Tactics

- Recognize recent IPA award recipients (Michele Greiner ECP Award and Ann Ernst Public Service Award)

Objective 3: Organize an ethics conference every odd-numbered year, granting 6 CEUs

Strategy 1: Collaborate with The Trust for hosting and sponsorship, if possible

Tactics

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

Objective 4: Offer a minimum of 20 CEs per year

Strategy 1: Offer a combination of virtual and in-person trainings each year

Tactics

- Aspire to offer an event quarterly, including spring conference, fall conference, Trust/ethics conference (every odd year), diversity conference (every even year if possible), and additional salons or training with low or no presenter fees
- Consult with finance committee to ensure each program will align with the budget

Committee Goal 2: Ensure completion of essential administrative tasks for events

Theme(s) related to goal: 5

Objective #1: Obtain signed contracts with speakers and locations of events

Strategy 1: Follow appropriate budgetary restrictions

Tactics:

- Establish budget for each conference with Executive Director and Treasurer (and Finance Committee as needed) before entering necessary contracts and agreements on behalf of the association
- Annually review speaker fees and registration fees for consistency, fairness, and financial prudence
- Negotiate costs with each speaker after budget is established, in consultation with the Presidential Triad
- Negotiate costs with each location after budget is established, in consultation with the Presidential Triad
- Set attendance fees with approval of Treasurer, in consultation with the Presidential Triad
- Establish discounts in collaboration with Treasurer (and Finance Committee as needed)

Strategy 2: Formalize agreement between association and event location, in consultation with the Executive Director

Tactics:

- Establish capacity provisions
- Agree upon cost of meal provision, if applicable
- Arrange room needs
- Arrange audio visual needs
- Ensure accessibility and accommodations
- Include a block of hotel rooms with conference rate, as applicable
- Include sign placement locations
- Ensure availability of registration area
- Establish cancellation policy

Strategy 3: Formalize agreement between association and all speakers, in consultation with the Executive Director

Tactics:

- Ensure availability of Executive Director in planning stages of all trainings requiring ED assistance during the event (i.e., conferences, online trainings)
- Executive Director obtains contract signed by conference chair and each speaker
- Presentation organizer, as delegated by committee chair, considers arranging and agreeing to transportation to and from event and as needed during the conference
- Presentation organizer, as delegated by committee chair, provides speaker information regarding conference hotel
- Executive director ensures all speaker requests for audio-visual needs are included in contract and provided
- Presentation organizer, as delegated by committee chair, considers offering speakers a reduced conference fee as part of an honorarium
- Include statement in contracts to communicate the requirement to include diversity, equity, and inclusion in programming offered by speakers
- Presentation organizer, as delegated by committee chair, informs speakers in initial outreach, and at the time of signing the contract, the expectation that diversity, equity, and inclusion will be included in the objectives

Strategy 4: Express gratitude following events

Tactics:

- President sends thank you letter to each presenter for Spring, Fall, and DSJ trainings (and possibly to individuals highly involved in arranging the presentation) post-conference or delegates the thank-you to presentation organizer, as appropriate
- Presentation organizer sends a thank you email or letter to salon/other presenters
- Gifts may be sent with thank-you letters as budget allows, in consultation with Treasurer

Objective #2: Provide complete conference packets for all events

Strategy 1: Executive director includes all necessary information and forms for attendees

Tactics:

- Include conference program and schedule
- Include nametag (in-person only)
- Provide list of sponsors and donors (in brochure and/or announcements)
- List vendors and a description of their products or services (in-person only)
- Provide CE attendance forms, considering 50 minutes to constitute 1 CEU
- Provide CE evaluation forms for each program, electronically and request completion within two weeks

Strategy 2: Include additional helpful information, if possible

Tactics:

- List places of interest
- List nearby restaurants
- Provide list of bios and publications of presenters (in marketing and print)
- Include a map of the city and area events of interest

Objective #3: Arrange and manage comprehensive registration table at each event

Strategy 1: Executive director establishes staffing for registration table

Tactics:

- Ensure availability of Executive Director as primary registration official
- Organize table with space for registration, conference packets, message boards, and financial transactions

Objective #4: Pass information to incoming co-chairs to facilitate completion of administrative tasks in conjunction with the Executive Director

Strategy 1: Maintain an electronic shared file of helpful information

Tactics

- Include sample contracts, agreements, programs, templates, evaluation forms, CE forms, and other relevant conference materials
- Include list of all programs offered by IPA
- Share electronic shared file with incoming co-chair each year
- Share committee strategic plan with incoming co-chair along with binder/file
- One month after each presentation, request export of narrative responses on evaluations and review as a committee

Strategy 2: Rotate co-chair and agenda setting status each year among Presidential Triad members according to outlined rotation schedule

Tactics

- Develop a clearly outlined rotation schedule

Committee Goal 3: Community building and networking through continuing education opportunities

Theme(s) related to goal: 2, 3

Objective #1: Include a social opportunity at each spring conference and at other conferences as desired

Strategy 1: Collaborate with committees and with IPF to allow time for relational activities

Strategy 2: Assist in promotion of committee relationship-building activities

Tactics:

- Contact ECP, Membership, and DSJ committees to coordinate planned activities prior to finalizing and announcing training/conference schedules
- Announce all socials, team building, awards, and meetings at the outset of each program day and encourage participation and networking
- List all structured relationship-building events in program schedule
- Seek committee collaboration for marketing events at registration booth

Objective #2: Include dissemination of information from leadership each conference

Strategy 1: Schedule time for business meetings and award ceremonies as listed above

Strategy 2: President, or president's delegate, provides announcements at outset of each session

Tactics

- Announce upcoming IPA events
- Include other announcements from IPA leadership
- Provide additional information, e.g., remind to use CE tracker, remind to donate to IPF, remind to participate in social events

Objective #3: Include time for initiatives desired by committees or IPF, as requested

Strategies: Seek and encourage inclusion of additional initiatives in program schedules

Tactics:

- Contact all committee chairs and IPF President seeking possible initiatives before finalizing program schedules
- Announce initiatives before programming begins each day
- List initiatives in program marketing materials, when possible
- Verify that associated costs have been discussed between committee chair and IPA Treasurer and approved by Treasurer

Committee Goal 4: Motivating member participation in IPA events

Theme(s) related to goal: 2, 3

Objective #1: Advertise dates and locations of conferences no later than 9 months before in-person events and 6 months before online events

Objective #2: Create promotional brochures and disseminate no later than 6 months before in-person events and 4 months before online events

Strategy 1: Coordinate design and printing (if relevant) of brochures

Tactics:

- Provide content to Executive Director for insertion into brochure templates
- Explicitly encourage student attendance

Strategy 2: Coordinate dissemination of announcements

Tactics:

- Email electronic brochure to all current and prospect members of IPA (using Newsletter software and IPA Elist)
- Mail paper brochures to all licensed psychologists in Iowa
- Identify other potentially interested groups to invite with brochures and electronic posts

- Executive director sends save the date information as early as possible

Objective #3: Provide recorded CE content each year

Strategy 1: Coordinate recording and posting of CE content

Tactics:

- Ask all presenters to allow recording and include in contracts as relevant
- Executive director coordinates recording of events and arranges set-up of necessary equipment in consultation with Presidential Triad and Treasurer, as needed
- Explore accommodations that may be made for recorded trainings, such as closed captioning
- Executive Director posts CE content to website
- Collaborate with Treasurer and Finance Committee, as relevant, regarding online CE costs

**Strategic Planning Goals Worksheet: Website, E-Communications, and Blog (WEB)
Committee (revised 11/09/2021)**

Committee Name: WEB Committee

Committee Members: Suzanne Hull, Valerie Keffala, PhD, Katie Kopp, PhD, Nicole Keedy, PhD

Date Created/Modified: 22-Mar-2021

Committee Goal 1: Community building online (E-List, Facebook Private Group and Blog)

Theme(s): Diversity, Equity, & Inclusion, Financial Stability, Advocacy, Building Connections & Community

Objective #1: Leverage IPA members via E-List to write 5 engaging blog posts per year

Strategy: Monitor E-List communications for potential topics

1. Tactic: Reach out to E-List members to author blog posts
2. Tactic: Encourage comments and engagement on the blog post once published
3. Tactic: Share blog post to FB Private Group and ask engaging questions

Strategy: Actively solicit bloggers for specific topics/ideas

1. Tactic: Reach out to IPA committees for blog post ideas
2. Tactic: Reach out to the E-List to identify bloggers to author the posts
3. Tactic: Encourage comments and engagement on the blog post once published
4. Tactic: Share blog post to FB Private Group and ask engaging questions

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

Strategy: Develop blog editorial calendar to include same authors/content as TIP

1. Tactic: Communicate requirements, expectations and deadlines to authors
2. Tactic: Share blog posts with ED to be included in The IPA Monday Minute
3. Tactic: Share blog post to FB Private Group and ask engaging questions

Committee Goal 2: Awareness and dissemination of information to members

Theme(s): Diversity, Equity, & Inclusion, Financial Stability, Advocacy, Building Connections

& Community, Education & Training

Objective #1: Implement initiatives to disseminate information to members

Strategy: Identify and implement new initiatives to disseminate information based on needs identified by the WEB Committee via the IPA website and blog

1. Tactic: Maintain membership tools: referral sources, CE tracker, by-laws, manuals, member lookup, etc. via the Member Resources Page
2. Tactic: Showcase the personal and professional contributions of IPA members with information relevant to IPA and its members via the blog (obtain permission from writer of nomination letter and recipient of award to turn into blog post)
3. Tactic: Dissemination of information to members via E-List and Monday Minute
4. Tactic: Dissemination of information to members via Blog

Strategy: Implement directed IPA website and blog initiatives in support of IPA committees and/or IPA leadership

1. Tactic: Update committee descriptions annually
2. Tactic: Ask committees to review website for functionality and user experience

Strategy: Ensure social media supports these strategies

1. Tactic: WEB Committee posts updates to IPA Private FB Group
2. Tactic: Blog Editor lists blog post titles and URLs monthly on Elist

Committee Goal 3: Website maintenance, updates, and oversight

Theme(s): Diversity, Equity, & Inclusion, Financial Stability, Advocacy, Building Connections & Community, Education & Training

Objective #1: Ensure website is user-friendly by June 30

Strategy: Conduct a website audit

1. Tactic: 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***
2. Tactic: 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***

Strategy: Respond to concerns that the WEB committee or other members identify as they arise

1. Tactic: Annually remind committee chairs and leaders to review website content relevant to their committee and to offer updates as needed