

*Health Policy and Administration Section**2009 Membership Development Plan**(HPA - MDP)*

**Purpose:** To guide and measure the ongoing process of HPA membership development in alignment with National and Section membership goals and objectives.

**Process:** Utilizing the APTA Membership Recruitment and Retention Handbook and APTA's Strategic Plan for Membership Development as guides, the process for developing and maintaining this membership plan will entail multiple sections/steps. The HPA Member Services Committee will review and revise the plan on an annual basis with presentation and discussion of results at the HPA Fall Board Retreat.

**Section One: Membership Trends**

HPA 2005 to 2007 YEAR-END FIGURES					HPA	APTA
	2005	2006	2007	05-06 % Change	06-07 % Change	06-07% Change
<b>PT</b>	2,091	1,964	1939	-6.07%	-1.27%	1.57%
<b>PTA</b>	71	64	66	-9.86%	3.13%	4.35%
<b>Student</b>	27	51	62	88.89%	21.57%	14.96%
<b>Total</b>	2,189	2,079	2067	-5.03%	-0.58%	4.21%

Committee Comments: HPA PT membership from 2005-2007 demonstrates a slow, but steady decline. PTA and student membership is for the first time on a positive incline with the student group showing the largest growth. Overall, the decline in PT and overall membership numbers slowed significantly from 06 to 07 compared the decline of 05 to 06. For 2008, we are starting to see some positive trends in our membership numbers. (See below)

HPA MEMBERSHIP JANUARY- JULY 08 FIGURES									
	Jan	Feb	Mar	Apr	May	Jun	July	Aug	Jan-Aug% Change
<b>PT</b>	1918	1921	1930	1950	1979	1981	2004	2015	5.06%
<b>PTA</b>	67	68	66	68	72	71	74	72	7.46%
<b>Student</b>	64	83	88	88	62	62	74	75	17.19%
<b>Total</b>	2049	2072	2084	2106	2113	2114	2152	2162	5.51%

Committee Comments: HPA membership numbers for 2008 are very positive with increases in PT, PTA and student membership compared to 2007 and comparing January to

August 2008. If membership numbers remain or increase from August numbers, HPA will meet its goal of 5% membership increase for 2008.

2003-2007 HPA New/Drop Comparison					Jan-Aug	
	2003	2004	2005	2006	2007	2008
New*	362	576	520	677 (273r)^	709(313r)^	562(208r)^
Drop**	875	715	498	781	703	456
Difference	-513	-139	+22	-104	+6	+106
2007 HPA RETENTION FIGURES						
	Billed	Renewed	% Renewed	APTA % Renewed (total National)		
PT	1764	1337	76%	80%		
PTA	59	34	58%	68%		

\* New numbers include the following: New to APTA/Section, New to Section, Reinstated

\*\*Dropped numbers include the following: Dropped, Transferred out, Deceased

^ reinstated (not truly 'new' to section but returned to section after lapse)

### 2008 Dropped Member Survey

Beginning in February of 2008, HPA member services began sending out surveys via survey monkey to members that dropped their HPA membership to gain insight on how we can retain and recruit members. Below is a summary of results as of 9/08:

- **Number of respondents:** 19 (14/19 took advantage of audio conference CD coupon)
- **Number of years as a HPA member:** 36.8% one year or less; 15.8% 2 years; 10.5% 3 yrs, 0.5% 4 years; 5.3% 5 yrs; 21,1% 5+ years
- **Present position:** 47.4% Management; 47.4% Clinician; 5.3% Researcher; 0% academic faculty
- **Private practice owner:** 15.8% yes; 84.2% No
- **Original reason for joining:** 57.5% Manager/Supervisory position; 57.9% concerns with health policy; 5.3% interest in CC SIG; 5.3% became a practice owner
- **Reason for not renewing membership in HPA:** 31.6% financial; 10.5% retirement/leaving active practice; 10.5% dissatisfied with actions of the section; 10.5% lack of understanding of HPA benefits; 5.3% HPA benefits do not meet my career needs; 5.3%

no active involvement in administration or health policy at worksite; 26.3% plan to focus on another section in APTA.

■ **When you were a HPA member, did you use the following resources?**

	Yes	No	I found this resource useful
HPA website	64.7%	29.4%	35.3%
HPA listserv	38.9%	61.1%	16.7%
HPA Resource	26.7%	73.3%	20%
HPA Journal	77.8%	11.1%	44.4%
HPA Audioconf.	17.6%	76.5%	5.9%
Other Members for assistance/device	6.3%	93.8%	0%

Committee Comments: As noted in the new/drop table above, 2007 and thus far in 2008 HPA new/drop numbers are showing positive trends.

The retention table shows HPA nearing national APTA rates for PTs.

The dropped member survey began Feb of 08 is giving some insight into the reasons why members are dropping their membership. The response rate for this survey is around 9%. The number one reason for dropping was due to financial reasons.

For 2008, member services efforts were devoted to gaining control over retention rather than recruitment. As we see the retention and overall membership numbers increasing, it will be important to continue our retention efforts as well as begin a plan for recruitment in 2009.

2006 Membership Survey Considerations: A full report regarding the 2006 HPA Membership Survey was provided to the HPA Board at the 2006 October Retreat. As this survey is produced only every three years, it is important to continue to revisit the data in order to attend to all of its facets appropriate in each year's MDP. Data which may be significant from the 2006 survey for the 2009 MDP includes:

- 78.1% of the 269 respondents were greater than 16 years past their entry level degree with 25.7% with 31 or more years past entry level degree.
- One third of respondents are currently in a management role and mostly in outpatient, acute care, and education settings.
- Only one member service had the major percentage within the category of 'very valuable' and that was the HPA Listserv. The HPA Resource, listserv, CSM programming, and networking opportunities were considered at least 'valuable' by over 50% of respondents. The website shows the most potential

for improvement from survey data since nearly half of respondents said they access the website at least monthly but only 38% reporting it as 'valuable' and 30% reporting it as 'somewhat valuable'.

■ 14.1% (36 of 256) reported being only 'somewhat satisfied' with their HPA membership. These are the members that we most likely lose when it comes renewal time so ultimately increasing the renewal rate by closer to 14% might be reasonable (although maybe not all at once).

The HPA membership will be surveyed again in 2009. A comparison and trending of results will be performed by the member services committee and shared by the next fall retreat.

Overall analysis of Membership Trends: It is encouraging for the Section that new membership has increased from 2005-2008 and is showing positive signs of sustaining itself for the time being. The dropped/lapsed membership numbers and retention percentage is becoming more in alignment with APTA benchmarks. Given that we are just beginning to understand why members are dropping and have only had the MDP in effect for a year, the Committee feels that great effort should be to continue to apply purpose to each membership initiative such that particular efforts can be tracked to know whether they are working or not. Therefore, the Committee will establish goals for 2009 reflective of the three main areas of (1) Continued retention, (2) Recruitment and (3) Measurement of current practices.

## Section Two: Annual Membership Goals

APTA Membership Development Goal (2005 Strategic Plan Goal VI): Communication throughout the Association enhances participation and responsiveness to members and promotes and instills the value of belonging to APTA.

HPA Membership Goal (2006 Strategic Plan):

Goal #2: Increase membership in HPA to 2700 members by 2010.

- A. Develop a well formed outcome for membership in HPA.
- B. Develop and implement a marketing plan to recruit and retain members.
- C. Investigate and evaluate communication with new and ongoing members.

HPA Membership Goal (2007 Strategic Plan):

Goal #2: Increase membership in HPA by 5% annually.

- A. Implement the Membership Development Plan
- B. Develop and implement a marketing plan to recruit and retain members.

HPA Membership Goal (2008 Strategic Plan): Pending board approval

Goal: Increase membership in HPA by 5% annually

- A. Implement the Membership Development Plan
- B. Develop and implement a marketing plan to recruit and retain members
  - a. Identify and recruit members through connections with all PT and PTA programs
  - b. Mentorship program

HPA Member Services Committee 2009 Goals/Objectives:

*Key for Objective/Strategy Completion: (Person responsible/deadline/status)*

**Goal 1: Increase retention of physical therapist members of HPA to 80% for 2009 (January through August)**

[consistent with APTA PT retention rate; would mean approximate retention of 39 more PT members than current; expected that strategies implemented to reach this goal will also positively affect PTA members as well and also attract some new members].

Objective 1.A.: Implement effective strategies for communication with current members

Strategy 1.A.1.: Survey HPA members in 2009 (Robin/Member Services/??)

Strategy 1.A.2.: Facilitate new booth design (Robin and Member Services/by June 09.

Strategy 1.A.3.: Determine budget for concepts desired and submit for Board approval. (Terri/September 2007/Complete)

Strategy 1.A.4.: Determine feasible measurement tool for each concept (Judy/Ongoing)

Strategy 1.A.5.: Coordinate with all appropriate HPA individuals and Committees to get concepts implemented integrating information from the well formed outcome (Judy/ongoing)

Strategy 1.A.6: Contact new members by phone to say thank you for

becoming a member and to share contact information and provide mentorship. (Robin to assign new members to board members each month; started October 2007; board members to call/Ongoing)

Strategy 1.A.7: Establish forum at CSM and survey to ask why new members have joined and what they expect to get from section membership (Terri/Feb 08/pending)

Strategy 1.A.8: Establish forum at CSM for the new professional to promote HPA section (Terri/Programming Committee/Feb 08/pending)

Strategy 1.A.9: Continue 6 month new member survey (Judy/ongoing)

Strategy 1.A.10: Create member benefit post card (Member Services and Robin/ 1<sup>st</sup> Q 09)

Objective 1.B.: Continue “Hands on HPA” opportunities program

Strategy 1.B.1.: Have each HPA board member determine small, infinite tasks that could be assigned to a general member and contact interested members when appropriate. (Judy/send out board email quarterly/ongoing)

Strategy 1.B.2.: Utilize the HPA Resource, website, list serv to announce that there are tasks available for members and have them complete the HPA opportunities form. (Judy/send out email to list serve and have article in HPA resource quarterly/ongoing)

Strategy 1.B.3.: Utilize the HPA opportunities form to assign tasks to

members based on interest as much as possible. (All Board Members)

Strategy 1.B.4.: Have the assigned general member be mentored by the originators of the task. (All Board Members)

Strategy 1.B.5.: Send a thank you letter and satisfaction survey to go the general member who has helped to assist in measuring their satisfaction with the “Hands on” program. (Robin/ongoing)

Objective 1.C.: Promote HPA website

Strategy 1.C.1: Promote the HPA website at every event and through all applicable Member correspondence. (Member Services Committee/Jan 08/Ongoing)

Strategy 1.C.2: Continue Member Knowledge Network for website (adjust topics and experts as needed)(Member Services Committee/Judy/ongoing)

Objective 1.D.: Incorporate HPA benefits and importance during all programming.

Strategy 1.D.1: Provide sponsorship by HPA info at start of HPA program followed by summary of health policy/administration/cross cultural/technology bullets at end of speaker’s program with link to HPA membership. (Program Committee/started CSM 2008/Ongoing)

Objective 1.E.: Identify and recruit members through all connections with PT and PTA

Programs

Strategy 1.C.1: Update database of administrative faculty (Judy/2<sup>nd</sup> Q 09/pending)

Strategy 1.C.2: Track membership of this group (Judy/ongoing)

Strategy 1.C.3: HPA to be involved with National Student Conclave- HPA booth, Student giveaways and programming (Member Services Committee, Program Committee/Oct 09/pending)

**Goal 2: Provide an analysis of 2008-2009 recruitment and retention tool effectiveness with recommendations for improvement to the HPA Board at the 2009 Fall Retreat.**

Objective 2.A.: Determine the current status of recruitment and retention tools by May 2009.

Strategy 2.A.1.: Design a table of recruitment and retention tools. (Judy)

Strategy 2.A.2.: Determine a measurement mechanism for each. (Judy)

Strategy 2.A.3.: Assign Committee and Office responsibility for data collection along with timetables for analysis. (Judy/ongoing)

Strategy 2.A.4: Survey all transferred out members via survey monkey for one year to attempt to better understand their reasons for leaving HPA. Plan to offer incentive of a free CD of HPA audio conference to entice them to complete the survey monkey questions. (Robin/ongoing for 2009)

Strategy 2.A.5: Determine if students mentored through 2009 HPA CSM process are members of HPA/APTA now that they are out of school to determine effectiveness of program. (Judy/pending)

Objective 2.B.: Implement measurement mechanisms for all applicable tools within second quarter of 2009.

Strategy 2.B.1.: Track the effectiveness of tools according to the timetable determined in strategy 2.A.3. (Judy/ongoing)

Strategy 2.B.2.: Responsible Committee member reports results of assigned areas to Committee at each Committee meeting with recommendations for modifications to measurement mechanism if necessary. (Judy/ongoing)

Strategy 2.B.3.: Committee Chair, with input from Committee, compiles data from measurements for January through August 2009 for report the HPA Board in October. Committee specifies the most effective and ineffective recruitment/retention tools and

makes recommendations for improvement 2010 Membership Development Plan. (Judy)

**Section Three: Budgetary Requirements**

**HPA Travel Budget Worksheet**

**Officer/Committee/SIG(see Class List) 1500 Member Services**

**Fiscal Year 2009**

Instructions:

1. Review the Expense Reimbursement Procedure and the Leadership Reimbursement Schedule.
2. Complete the heading on the HPA Travel Budget Worksheet.
3. Enter an event (i.e CSM, Board Meeting, Gov't Affairs) in column A.
4. Enter the traveler(s) for each event in column B. One traveler per line.
5. In column C enter the travel rate. Air or rail fare reimbursement is based on *economy/coach or less* round trip fare
6. In column D enter the number of days of per diem for each Traveler.
7. In column E enter the appropriate per diem rate.

CSM Las Vegas - Hotel \$229 + tax \$21 = \$250/day + meals \$65/day = \$315 per diem/day

Annual Baltimore - Hotel \$190 + tax \$26 = \$216/day + meals \$65/day = \$281per diem/day.

1. Multiply column D by column E. Enter the total per diem in column F.
2. After entering all Events/Projects and Travelers total columns C and F.

	A	B	C	D	E	F
Line	Event/Project	Traveler	Travel Rate	# Days	Per Diem/Day Hotel + \$65 for Meals	Total Per Diem D x E
1	CSM	Terri Simzer Chair	600	3	315	945
2		Judy Jenkins	600	1	315	315

3		Judy Jenkins	200	1	281	281
	Annual Conf					
4	Board Retreat	Judy Jenkins	600			
5		(2)HPA members	800	4 (2ea)	\$265	1060
	NSC		(400 ea)			
	<b>Total</b>		\$2800			\$2601
	<b>Enter in Budget Summary Worksheet</b>					

**HPA Project Budget Worksheet**

**Officer/Committee/SIG(see Class List)1500 Member Services**

**Fiscal Year 2009**

References:

1. Chart of Account
2. Class List

Instructions:

1. Review previous years budget, and to date actual income/expense.
2. What projects have been completed or do not carry over to the next budget year?
3. What new projects should be considered for next year?
4. Complete the heading in the HPA Project Budget Worksheet.

5. In column B enter the name of a Project i.e. CSM, Audio Conference, Publish "Resource", Educators Survey, Offer Research Grant.
6. In column C enter each account (see chart of accounts, i.e. "Resource" Advertising, Postage, Printing, Grants) that represents the income and expense for the project. This may be multiple lines.
7. In column D enter the amount of income or expense for each account.
8. For each Project transcribe the Travel and Per Diem to the HPA Travel Budget Worksheet.
9. Repeat steps 2 – 4 for each project, use additional forms as necessary.
10. Enter Account totals on Budget Summary Worksheet.

A	B	C	D
Line	Project	Account	Amount
1	Income	2100- Dues  Trended from 2007 actual and 2008 YTD.	\$92,000
2		2410-Royalties  Has been budgeted in the past for the desktop consultant. No royalties expected for 2009	\$0
3	Expenses  Booth	3500-Display  Budgeted to send display to CSM, annual conference and NSC (\$1100). Add'l \$700 to update photographs. \$200 to have a prize wheel or some other draw to HPA booth.	\$2000
4	Hands on HPA, Renewal cards, welcome packets, audioconference CDs for those that filled out dropped member survey	3800- Postage/handling  Trended from 07 and YTD 08.	\$1800

5	Member benefit postcard-  Looking to design and print a postcard explaining all member benefits. To be used at booth and sent out to new members in welcome packet	3900- Printing  .	\$500
6	All materials going out to members: renewal postcard, letters etc.	3900- Printing  Trended from 07-08	\$1200
7	CSM Student mentoring program	4200- Registration Comp  CSM student registrations for 8 students	\$600
8	Conference calls	5300-Telephone  4 conference calls x 3 people	\$60
9	Promotional items for students and HPA members	5400-Promotional material  \$1500 for promotional item at NSC and \$1200 for HPA pins.	\$2700
10	Dropped member survey incentive	7100-Misc  Will continue at least 6mo of offering CD audioconference voucher for those that fill out the dropped member survey. \$5/CD x 20 members	\$100

## HPA Budget Summary Worksheet

## Officer/Committee/SIG(see Class List) 1500 Member Services

### Fiscal Year 2009

#### References:

1. Chart of Account
2. Class List

#### Instructions:

1. Complete the heading in the HPA Budget Summary Worksheet.
2. In column B enter each account that has been used in the HPA Project Budget Worksheet(s).
3. From the HPA Travel Budget Worksheet transcribe the total per diem from column C and total travel from column D into lines 1 and 2, column C of the Budget Summary Worksheet.
4. For each account enter the total amount for that account from the HPA Project Worksheets into the appropriate line of column C in the HPA Budget Summary Worksheet.

A	B	C
Line	Account	Total Amount from Travel and Project Worksheets
1	Total Travel	\$2800
2	Total Per Diem	\$2601

3	2100- Dues (income)	\$92,000
4	3500- Display	\$2000
5	3800- Postage	\$1800
6	3900- Printing	\$1700
7	4200- Registration Comp	\$600
8	5300-Telephone	\$60
9	5400- Promotional Material	\$2700
10	7100- Misc.	\$100