



**Strategic Plan  
July 2023-July 2026**

**Mission:** The Ohio Counseling Association (OCA) advances professional counseling through counselors' opportunities for leadership, networking, mentoring, advocacy, and professional development, allowing vertical growth for career mental health professionals.

**Purpose:** The purpose of the OCA three-year Strategic Plan (SP) is to provide continuity of mission and goals from year-to-year and Executive Council to Executive Council and that the goals are shared with members of OCA so they can best serve their clientele. The SP strengthens the OCA's Chapters, Divisions, and Committees and aids in the enhancement of the practice of professional counseling and promotes culturally relevant best practices, and effective counselors.

**Focus Areas:** The focus areas identified in the strategic planning process in 2022-2023 include Leadership Pipeline, Membership Recruitment/Retention, Finance, AOCC Strategic Partnerships, and OCA Climate. To ensure effective execution of the SP in alignment with current practices and measuring progress of initiatives annually, the SP encourages continuous and new initiatives to be in place by year 1 to enhance further developed initiatives that will be implemented during years 2 and 3.

Working collaboratively for the health of OCA is a significant step toward this synergy, and that can be fully optimized. Completing this SP over the next two years will help OCA gain strength and become a more vital organization.

Respectfully submitted,  
OCA Executive Board

Focus Areas	Objectives
<b>Leadership Pipeline</b>	The leadership pipeline includes initiatives related to improving the procedure for building and maintaining the OCA leadership succession bench, including cultivating diverse leaders through the Leadership Certificate Program (LCP), providing a mentoring process for the OCA succession bench, leadership orientation, and the overall effective functioning of the organization.
<b>Membership Recruitment</b>	Membership recruitment includes increasing the membership benefits, including an OCA Ambassador program initiative to enhance recruiting within the counseling programs in Ohio and building relationships with state private practices and community agencies.
<b>Membership Retention</b>	Membership retention includes continuing to foster a strong sense of connected community amongst members and leadership, not limited to continuing quarterly Meet & Greets, developing case consulting groups, monitoring inactive members in OCA activities, chapters/divisions, and creating ways to engage, increase accessibility for continuing education sessions, collaborate and connect.
<b>Finance</b>	Finance includes obtaining and maintaining reserve funds and offering scholarships, grants, and financial support for OCA committees and members.
<b>Conference Strategic Partnerships</b>	The conference's strategic partnerships include recruiting conference sponsors early and helping with sustainability for reoccurring sponsors (i.e., career fair, counseling programs showcase), but are not limited to creating scholarships, improving conference accessibility, and sustaining affordable student registration.
<b>OCA Climate</b>	The OCA climate includes increasing Diversity Equity Inclusion (DEI) representation in leadership roles, developing groups (e.g., BIPOC coffee hour) to support members, increasing DEI membership, developing OCA Interest Networks and a collaborative partnership to increase DEI initiatives, and conducting needs assessments annually.

## Work Plan

Focus Area	Action Items	Anticipated Outcomes	Implementation Initiatives
Leadership Pipeline	<ol style="list-style-type: none"> <li>1. Improve procedure for building and maintaining the OCA leadership succession bench.</li> <li>2. Continue to support and expand Leadership Certificate Program (LPC)</li> <li>3. Collaborate with div/chapt/com to promote increased diversity and inclusion in leadership development.</li> <li>4. Leadership membership</li> </ol>	<p>1-1 Develop leadership guidelines for Executive Board &amp; div/chapt/com to obtain and maintain consistency in leadership</p> <p>2-1 Creating Advance leadership after LPC</p> <p>3-1 Develop a DEI specialty track, increase student and practitioners in leadership roles</p> <p>4-1 Develop a plan to support leader membership</p>	<p>1 &amp; 3 Y1: Div/Chapter leaders communicate the importance of succession plan by identifying goals and objectives. Add to quarterly report- include your current process of a succession planning</p> <p>1.Y1: President-elect to be mentored by the president beginning July 1 as the term begins; Past President actively mentors Executive Board &amp; div/chapt/com</p> <p>2.Y1: Increase marketing initiatives for the Leadership Certificate Program (i.e., podcast, distribution list announcements, Ambassador program)</p> <p>3. Mentorship will assist with Graduate Student engagement and sense of belonging while building a leadership pipeline.</p> <p>4.Y1: Explore the possibility of restricting the required membership to be a leader. Current requirement is to be an OCA and an ACA member to be an officer.</p>

Focus Area	Action Items	Anticipated Outcomes	Implementation Initiatives
Membership Recruitment	<ol style="list-style-type: none"> <li>1. Communicate a list of membership benefits.</li> <li>2. Develop membership discount.</li> </ol>	<p>1-1 Provide the membership benefits on the OCA website</p> <p>2-1 Offer discount based on the membership duration and number of participation in OCA events, such as serving an office position or presenting at AOCC/SP conferences. Offer a set number of FREE CEs for new professional members.</p>	<ol style="list-style-type: none"> <li>1. Y1-2: Initiate improving more interactive and inviting OCA website</li> <li>2. Y1-2: Initiate the possibility of offering the membership discount program</li> </ol>

	<p>3. Develop membership benefits to graduate students.</p> <p>4. Develop an OCA Ambassador program.</p> <p>5. Develop and maintain private practice branch of OCA</p>	<p>3-1 Discount first-year rate for Masters Level students and increase in discount with a 3- or 5-year membership subscription option transitioning from student to professional.</p> <p>4-1 Designated liaison to the counseling programs and practitioners, but not limited to the agency</p> <p>5-1 Design a branch of OCA that is designated to counselors working in and / or operating a private practice. Offer CEs about the business end of mental health.</p>	<p>3. Y1: Charged to OCA Ambassador program leadership to initiate the Ambassador program.</p> <p>4. Y1-2: Identified first President to develop new division; gain additional leadership</p>
--	--	--	---

Focus Area	Action Items	Anticipated Outcomes	Implementation Initiatives
<p>Membership Retention</p>	<ol style="list-style-type: none"> <li>1. Communicate OCA activities with members.</li> <li>2. Assess a needs assessment annually.</li> <li>3. Continue to foster a strong sense of connected community amongst members and leadership.</li> <li>4. Mentor new members on the ways to navigate member benefits.</li> </ol>	<p>1-1 Provide members with the “Quarterly-at-A-Glance” summary of what OCA accomplished.</p> <p>2-1 Provide the summary of the OCA surveys to update the members and Raffle for the participant(s)</p> <p>3-1 Offer various forums to increase membership engagement, but not limited to a set number of FREE CE sessions. OCA ambassador program</p> <p>4-1 Div/Chpt/Com leaders to send a welcome note to new members and offer the new member orientation, including regular gatherings, either virtual or f2f.</p> <p>4-2 Attend OCA activities/events with new members but are not limited to Quarterly Meet &amp; Greets offered by OCA Executive Board members.</p>	<ol style="list-style-type: none"> <li>1. Y1-3: Continue strengthening the communication through the OCA Media, Public Relations, and Membership (MPRM) Committee initiatives, including LinkTree, OCA newsletter The Counselor Connection, OCA Podcast: Ohio Counseling Conversations; Ambassador Program</li> <li>2. Y1-3 Continue to strengthen LCP, supervisor directory, and Government Relations Committee activities and update the members consistently.</li> <li>3. Y1-2: Emphasis placed on accessibility, but not limited to Div/Chpt/Com events, AOCC, and SP conferences, including</li> </ol>

	5. Monitor non-participating members in OCA activities, chapters/divisions and create ways to engage, collaborate and connect	5-1 Develop a pathway for the members to create Interest Network but not limited to the online student interest network without fee and offer at least 1 CE a year.	a hybrid model of remote and onsite opportunities to earn CEUs
--	---	---	--

Focus Area	Action Items	Anticipated Outcomes	Implementation Initiatives
Finance	<ol style="list-style-type: none"> <li>1. Obtain financial stability</li> <li>2. Develop OCA grant pathway</li> <li>3. Develop OCA scholarship pathway</li> </ol>	<ol style="list-style-type: none"> <li>1-1. Open OCA reserve fund and determine a goal amount to contribute to reserve fund</li> <li>2 &amp; 3: Establish budget to increase funding and incentives; increased attention on grants and scholarship for OCA members.</li> </ol>	<ol style="list-style-type: none"> <li>1. Y1-3: Maintain a reserve account, including allocating proceeds from the annual AOCC Conference to the reserve fund.</li> <li>2 &amp; 3. Y1: Set the number of grants and scholarship amounts.</li> </ol>

Focus Area	Action Items	Anticipated Outcomes	Implementation Initiatives
Conference Strategic Partnerships & member benefits	<ol style="list-style-type: none"> <li>1. Recruiting for conference sponsors early</li> <li>2. Establish a Graduate recruitment fair and Career fair.</li> <li>3. Develop a pathway for the members to save the conference expense.</li> </ol>	<ol style="list-style-type: none"> <li>1-1. Reoccurring sponsors to obtain sustainability</li> <li>2-1. Have agencies, practices, and universities (counseling programs) pay for a booth</li> <li>3-1. Create a communication platform for the members to get connected with others to share overnight accommodation and other travel expenses for the AOCC.</li> <li>3-2. AOCC Scholarships for students to gain opportunities to gain professional development experiences.</li> <li>3-3. Reduce student conference registration fee</li> </ol>	<ol style="list-style-type: none"> <li>1. Y1-3: Market upcoming conference and offer a discount rate if members register for upcoming conference prior to leaving. During AOCC and OCA Spring Conference, provide members an opportunity to secure registration for the next event.</li> <li>2. Y1: Partnership with Div/Chpt to provide financial support for their</li> </ol>

	4. Develop conference recruitment tools.	4-1. Consider weekend conferences to benefit the practitioners 4-2. Consider rotating the location of the conference site 4-3. Develop guidelines for the AOCC accessibility 4-4. Increased quality of the presentation and consistency with the description. 4-5. Create specific clinical tracks	members.  3. Y1-2: Increase accessibility
--	--	--	---

<b>Focus Area</b>	<b>Action Items</b>	<b>Anticipated Outcomes</b>	<b>Implementation Initiatives</b>
OCA Climate	<ol style="list-style-type: none"> <li>1. Increase DEI representation in leadership roles</li> <li>2. Increase DEI membership and support them</li> <li>3. Develop a collaborative partnership to increase DEI initiatives</li> </ol>	<ol style="list-style-type: none"> <li>1-1 Collaborate with Div/Chpt/Com to develop and support programming to promote increased diversity and inclusion in leadership development at all OCA level</li> <li>2-1. Strengthening the respectful relationship between Practitioners and Counselor educators.</li> <li>2-2. Develop OCA listserv professional guidelines to strengthen professional conduct.</li> <li>2-3. Incorporate universal design to increase accessibility and remove barriers</li> <li>3-1. Div/Chpt/Com and the DEICDC develop criteria for OCA groups to meet to promote DEI ideas</li> </ol>	<ol style="list-style-type: none"> <li>1. Y1-3: Ensure Executive Board/Div/Chpt/Com develops DEI initiatives in annual plans and document them in quarterly and annual reports.  Y1-2: Identify DEI representatives that completed Leadership Certificate</li> <li>2. Y1-3: Assess a DEI needs assessment annually.</li> </ol>