

2015 & 2016

Canadian Dental Assistants' Association Strategic Business Plan



January 2015

INTRODUCTORY STATEMENT

This strategic business plan has been developed by the Canadian Dental Assistants' Association (CDAA) to provide a disciplined, transparent approach to the management of the Association, for fiscal years 2015 and 2016.

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EXECUTIVE SUMMARY

This strategic business plan addresses the continued commitment and passion the Canadian Dental Assistants Association (CDAA) has shown for elevating and supporting the dental assisting profession for the past 70 years . The strengths of the CDAA are grounded in a wide range of skills and strengths of those dental assistants who each day give their expertise, time and effort to strive to advance the profession for the benefit of dental assistants across the country and to improve the oral health of Canadians. The focus of this strategic plan is the “greater whole,” rather than the particular parts that compose it. The plan proposes goals and actions that crosscut or transcend the boundaries of CDAA organizational member versus former organizational members. It suggests that the Association can take even greater advantage of its distributed strengths while also reinforcing those strengths and facilitating a “bottom-up” approach to fostering innovation and creativity to address the challenges facing the Association. The plan recognizes that the relationship of each provincial association to the CDAA should involve an ongoing, dynamic and transparent interchange. The need for the CDAA to behave as cohesive unit, that is, to chart strategic directions and mobilize concretely around those directions will allow CDAA to successfully address challenges and take advantage of opportunities to realize its objectives in both its current and future dynamic environment.

HISTORY OF THE CANADIAN DENTAL ASSISTANTS' ASSOCIATION

The Canadian Dental Assistants Association (CDAA) is operated by a volunteer Board of Directors of up to 14 members, including: the President, Past President, Vice President, one representative from each CDAA Organization Member, one representative from the Royal Canadian Dental Corps and other positions the Board deems necessary.

The President, Past-President and Vice President each serve a one-year term, with the option of extending their term with the support of the CDAA Board of Directors.

Provincial and Territorial representatives are elected or appointed to a two year term, which can be extended to a maximum of three consecutive terms.

The officers of the CDAA are the President, Past-President, Vice President and the Executive Director.

1926: Marion Edwards begins organizing dental assistants in Eastern Canada.

1945: A meeting held in Winnipeg to organize a national organization. Marion Edwards is elected first President of the Canadian Dental Nurses & Assistants' Association (CDNAA).

1956: Mary Groszek (Fullerton) elected President. Ms. Fullerton's main focus was on National Incorporation

1957: CDNAA becomes legally incorporated.

1960: CDNAA establishes continuing education study courses and higher standards towards national certification.

1968: First 136 members are nationally certified.

1982: The CDNAA officially becomes the Canadian Dental Assistants' Association (CDAA)

1997: First transfer membership agreements signed with Alberta, PEI, Nova Scotia and New Brunswick.

1998: The National Dental Assisting Examining Board (NDAEB) is created to oversee the national certification and examination process. Transfer membership agreements were signed with 8 provincial dental assisting

associations resulting in CDAA membership increasing to 17,000 making the CDAA Canada's largest association of dental professionals.

1999: An International Alliance was formed with the American Dental Assistants Association.

2000: Manitoba becomes the 9th provincial dental assisting association to enter into a transfer membership agreement.

2001: CDAA changes bylaws to reflect the importance of the transfer agreements and the need for provincial associations to have a say in CDAA affairs. Quebec Dental Assistants Association signs transfer membership agreement. CDAA partners with the NDAEB to complete the first National Occupational Analysis for dental assisting. Dental Assisting Educators of Canada (DAEC) became a sub-committee of the CDAA.

2004: The Canadian Forces joined CDAA as the 11th Corporate Member.

2006: CDAA becomes a federation of ten provincial dental assisting associations and the Canadian Forces Dental Services.

2008: Mutual Recognition Agreement signed by all Dental Assisting Regulatory Authorities, Ontario Dental Assistants Association and the Quebec Dental Assistants Association.

2009: The first national online Salary & Benefits survey conducted. CDAA achieved financial stability.

2010: DAEC rejoin CDAA as a standing committee. Emergency policy created for provincial dental assisting associations in need.

2011: ODAA and CDABC cease to be a member of CDAA. CDAA launches a new website and online continuing education.

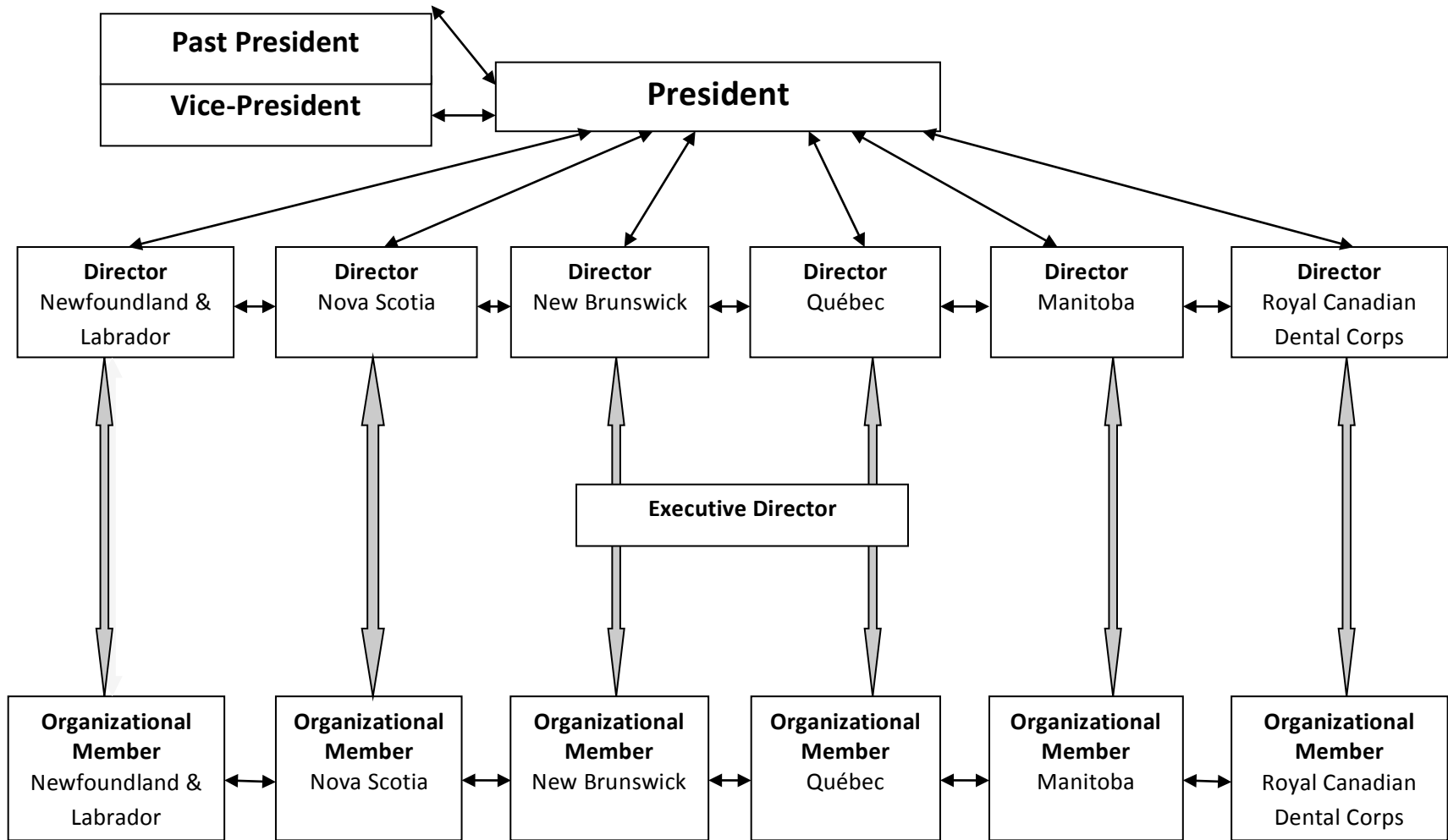
2013: DEAC ceases to be a standing committee.

2014: SDAA ceases to be a member of CDAA.

2015: CADA ceases to be a member of CDAA. CDAA sunsets its online delivery of continuing education.

**CDA
ORGANIZATIONAL CHART**

MANAGEMENT BOARD AND STAFF



ORGANIZATIONAL TENETS

ORGANIZATIONAL VISION

The CDAA is a unified federation that is internationally recognized as a progressive dental assisting association.

MISSION STATEMENT:

CDAA's mission is to provide national leadership for the dental assisting profession furthering the interests of its member organizations and advocating on oral issues having national impact.

CDAA helps to advance the profession and advocate for Dental Assistants through our three core priorities:

1. Advocacy and Policy Influence
2. Knowledge and Research, and
3. Capacity Building for our Member Organizations

ORGANIZATIONAL TENETS (cont'd)

VALUES:

CDAA believes that in servicing the needs of its Organizational Members (OMs), the dental assisting profession and the oral health of Canadians is advanced. CDAA serves the OMs with values of:

1. Respect for a federated membership governance model
2. Honesty and integrity
3. Professionalism, respect, and dedication
4. Transparency
5. Unity of the profession across Canada
6. Promoting community

CDA S.W.O.T. ANALYSIS

(Strengths, Weaknesses, Opportunities, & Threats)

STRENGTHS

Internal

- strong, committed leadership - cohesive Board of Directors speaking with a unified voice
- supportive, committed OMs
- strong internal governance structure - updated by-laws, clearly defined roles and responsibilities.
- capable, efficient office support staff
- financial stability
- secure, financial investments exceeding \$85K
- up-to-date office technologies and equipment

External

- positive relationship with oral health industry stakeholders
- positive relationships with oral health industry partners
- actively pursuing research specific to dental assisting
- offers malpractice insurance, protecting thousands of dental assistants
- offers group benefits to dental assistants
- offers group insurance benefits to dental assistants
- loyalty program with BMO Mastercard offered to dental assistants

WEAKNESSES

Internal

- long-term planning is difficult due to the high impact that OMs' internal decisions have on the Association
- significant reduction in operating capital beyond 2015
- OMs lack of confidence in Association's ability to deliver on key priorities
- OMs lack of confidence in Association's ability to deliver tangible value-added services/deliverables
- internal control policies outdated or non-existent (i.e. GST policy)
- record management in disarray (both soft and hard records)
- IT contracts unorganized
- no future IT plan (ie. Social media, website development)

External

- perception of decreased stability/viability of the Association amongst industry partners, given departures of 4 OMs in recent years
- perception of decreased legitimacy of the Association among industry partners, given lack of a proactive approach to policy development
- former OMs lack of confidence in Association's ability to deliver on key priorities
- former OMs financial situation and/or internal strategic focus does not align with the national Association

OPPORTUNITIES

Internal

- pursuing research specific to dental assisting
- commitment of Board and OMs to pursuing activities to elevate the profession across Canada
- openness of Board to exploring new ideas and business activities/models to improve service-delivery
- improving transparency to Board and OMs
- improving communication between Board, Executive Director and OMs
- shift to activities with a national scope
- reducing member-service related activities
- improving respect for OMs' role in the federated model
- updating IT
- renewing office organization/records management to improve capacity/streamline and reduce costs
- update/streamline accounting and banking practices to improve capacity and reduce costs

External

- strengthening linkages with former OMs
- improving communication and relationships with former OMs on initiatives and opportunities for partnerships
- strengthening of communication and relationships with Federal Government
- participation at national-level events with oral health industry partners and stakeholders
- communication and relationship-building with oral health industry partners (i.e. hygienists, dentists, oral health researchers, etc.)
- improving marketing and communication of national voice
- assisting with the development of capacity across all provincial jurisdictions

THREATS

Internal

- arrival of new Board members in 2015 may reduce cohesiveness of Board
- financial sustainability of Association beyond 2015
- financial status of remaining OMs
- timing of decision-making to address future budget shortfall
- focus on OMs versus former OMs, rather than building relationships, partnerships and initiatives across the country for the elevation of the profession
- reduction in OM commitment to national association
- non-delivery on identified key priorities

External

- former OMs lack of willingness to partner with CDAA
- former OMs financial stability
- potential reduction in invitations to participate on national level initiatives led by oral health industry partners and stakeholders
- lack of support for a national dental assisting Association amongst oral health industry partners and stakeholders
- low National Occupation Classification impacting federal policy delivery

KEY PRIORITIES

1. National Level Advocacy

Specific Objectives:

1.1 To unify the profession of dental assisting across Canada

Objective	Action Steps	Persons	Year	Milestones/ Completion	Resources Required	Evaluation
To understand the current needs and past issues of former Organizational Members (OMs).	<p>1. Meet with representatives of former OMs to discuss reasons for their departure from CDAA and to understand their current needs.</p> <p>2. Provide de-brief of meetings to CDAA Board & OMs for future decision-making purposes.</p>	Representative(s) from CDAA Board Executive (such as President or VP or Past-President) + CDAA Executive Director (ED) + Executive of Provincial Association	2015	<p>Meet with CDABC Executive – <i>completed March 2015; de-brief provided to Board of CDAA</i></p> <p>Meet with ODAA Executive – <i>completed April 22, 2015; de-brief provided to Board of CDAA</i></p> <p>Meet with SDAA -<i>target date October 16, 2015</i></p> <p>Meet with CADA - <i>target date Q3 2015</i></p> <p>Roll-up report to be provided to CDAA Board and OMs</p>	<p>Individuals to attend mtgs.</p> <p>Max \$6000 allocated to travel should in-person meetings be required and efficiencies not able to be realized around existing conference events (i.e. DARA)</p>	CDAA Renewal Committee to submit report on findings to CDAA Board. CDAA Board to provide final report to CDAA OMs via CDAA ED.

Objective	Action Steps	Persons	Year	Milestones/Completion	Resources Required	Evaluation
To increase knowledge of issues facing dental assistants across all provincial jurisdictions.	<p>1. CDAA ED to hold a one-hour per month conference call attended by all provincial associations to share issues they are facing in their regions.</p> <p>2. CDAA ED to report to CDAA Board at monthly Board meeting.</p>	CDAA ED + representative from each provincial jurisdiction.	2015 <i>and on-going</i>	<p>1. Year-long call schedule to be established in Q3 of 2015.</p> <p>2. CDAA ED to invite representatives of each provincial jurisdiction to conference call each month on a set date – <i>targeted start date Sept 2015.</i></p>	<p>Representatives to attend meetings.</p> <p>Conference call cost (~\$100/mth) - through existing service provider.</p>	<p>Bi-Annual questionnaire to be prepared by CDAA ED and to be circulated to all participants to garner feedback on process and way forward.</p> <p>Report on feedback to be provided to CDAA Board.</p>
To develop opportunities to partner on issues relevant to the profession with provincial counterparts and/or associations regardless of their membership status in CDAA.	<p>Examples, such as:</p> <p>1. National Occupational Re-Classification (NOC) submission (<i>partnership with SDAA</i>)</p> <p>2. Letter of support for New Caledonia College's dental assisting program (<i>CDABC</i>)</p>	Representative of each provincial jurisdiction and/or association + relevant CDAA committee and/or Director + CDAA ED, as required	2015 <i>and on-going</i>	<p>1. NOC Re-Classification – <i>targeted completion date Aug 2015</i></p> <p>2. New Caledonia letter – <i>completed Mar 2015</i></p>	<p>\$ Resources required will depend on the nature of the issue brought forward by provinces.</p> <p>To date, NOC resources = ED & SDAA time to prepare submission for Board approval.</p>	<p>NOC submission evaluation will be completed by Statistics Canada/ESDC</p> <p>Evaluations on initiatives will be determined on a case-by-case basis.</p>

1.2 To become a stronger national voice for the profession of dental assisting

Objective	Action Step	Persons	Year	Milestones/Completion	Resources Required	Evaluation
To participate in national level fora related to oral health.	<p>Participate in/contribute to national level fora such as, but not limited to:</p> <ol style="list-style-type: none"> 1. Canadian Oral Health Roundtable (COHR) and its related initiatives/policy development. 2. Dental Assisting Regulatory Authorities meeting (April 2015 & 2016) 3. Canadian Health Human Resources Network (CHHRN) Symposium (Oct 2015-<i>tb</i>) 4. First Nations Inuit Health Branch (FNIB) Oral Health Strategy 	Representative(s) from CDAA Board Executive (such as President or VP or Past-President) + CDAA ED	2015 <i>and on-going</i>	<ol style="list-style-type: none"> 1. Completion of CDAA Position statements on 3 COHR priorities – <i>completed Q3 2014.</i> 2. Endorsement of COHR draft long-term care statement – <i>completed Q1 2015</i> 3. Participation in the COHR 2015 – <i>completed Feb 2015</i> 4. De-brief of COHR submitted to CDAA Board – <i>completed Mar 2015 and to OMs at AGM 2015</i> 5. CDAA participation in future working groups and consultation on COHR priorities<i>on-going</i> 	Representative(s) from CDAA Board Executive (such as President or VP or Past-President) + CDAA Executive Director (ED)	CDAA Board to provide annual status report to provincial jurisdictions via CDAA ED.

Objective	Action Step	Persons	Year	Milestones/ Completion	Resources Required	Evaluation
To develop tools to assist dental assistants across all jurisdictions	1. Update skills list through consultation with all provinces and disseminate to all - upload to CDAA website.	In consultations with provincial representative(s) + CDAA Board (such as the Knowledge Transference Committee) + CDAA ED	1. 2015	1. Consultations to begin in Q3 of 2015. Draft Q4 of 2015. Approval and circulation Q4 2015.	Provincial representative(s) + CDAA Board Executive (such as Knowledge Transference Committee) + CDAA ED to draft and consult. Conference call cost (~\$100/mth) - through existing service provider.	1. Provincial representative(s) + CDAA Board Executive (such as the Knowledge Transference Committee) + CDAA ED to conduct post-mortem review of process Q1 2017. Circulate to OMs & provinces.
	2. Create a “toolkit” for dental assistants to assist them in making strong employment choices.		2. 2016	2. Consultations in Q1 2016. Draft Q2. Approval at AGM 2016. Circulation Q3 2016		2. Questionnaire to circulate via OMs & provinces & via CDAA FB to gain feedback on the toolkit. Report to Board for future iterations Q4 2016.

1.3 To raise awareness and increase visibility of the profession of dental assisting

Objective	Action Step	Persons	Year	Milestones/ Completion	Resources Required	Evaluation
To participate in national level fora related to oral health.	<p>Participate/contribute to national level fora such as, but not limited to:</p> <ol style="list-style-type: none"> 1. Canadian Oral Health Roundtable (COHR) and its related initiatives/policy development. 2. Dental Assisting Regulatory Authorities meeting (April 2015 & 2016) 3. Canadian Health Human Resources Network (CHHRN) Symposium (Oct 2015-<i>tb</i>c) 4. First Nations Inuit Health Branch (FNIB) Oral Health Strategy 	Representative(s) from CDAA Board Executive (such as President or VP or Past-President) + CDAA ED	2015 <i>and on-going</i>	<ol style="list-style-type: none"> 1. Completion of CDAA Position statements on 3 COHR priorities – <i>completed Q3 2014.</i> 2. Endorsement of COHR draft long-term care statement – <i>completed Q1 2015</i> 3. Participation in the COHR 2015 – <i>completed Feb 2015</i> 4. De-brief of COHR submitted to CDAA Board – <i>completed Mar 2015</i> 5. CDAA participation in future working groups and consultation on COHR priorities <p><i>.....on-going</i></p>	Representative(s) from CDAA Board Executive (such as President or VP or Past-President) + CDAA Executive Director (ED)	CDAA Board to provide annual status report to provincial jurisdictions via CDAA ED.

Objective	Action Step	Persons	Year	Milestones/ Completion	Resources Required	Evaluation
To participate at oral health events in conjunction with industry partners	1. Attend the Pacific Dental Conference in British Columbia (Mar 2015)	Representative(s) from CDAA Board Executive (such as President or VP or Past-President) + CDAA ED	2015 <i>and on-going</i>	1. <i>completed Mar 4-7 2015</i>	1. Max \$6000 for travel-related expenses + availability of representatives	De-brief of events to be provided to CDAA Board/OMs identifying and outlining any opportunities for growth.
	2. Attend the Atlantic Dental Conference in St.John's NFLD (Aug 2015)			2. <i>targeted attendance August 2015</i>	2. \$1800 for travel -related expenses	
To increase awareness of CDAA's objectives and initiatives amongst provincial associations, oral health partners, industry partners, dental assistants and the public.	1. Stand-up of CDAA's Facebook page with up-to-date, regular postings	CDAA Board + CDAA ED	1. 2015	1. <i>completed April 2015</i>	1. \$3600 for IT contract to link CDAA Facebook page to postings on website's Wordpress site. Updates to CDAA Website plug-ins. ED to update FB page as initiatives/project evolve.	1. Following 6 months (Q4 2015) request OM/provincial association feedback on Facebook posts and usage.
	2. Quarterly reports provided via email and letters to provincial associations, oral health partner and industry partners.		2. 2015 <i>and on-going</i>	2. each quarter of 2015 and 2016	2. ED to prepare update to provincial associations.	2. At end of year 1 (2015) feedback from report recipients to improve/ amend

2. Knowledge Transference

Specific Objectives:

2.1 To focus on research related to the profession of dental assisting

Objective	Action Steps	Persons	Year	Milestones/ Completion	Resources Required	Evaluation
To develop research on subjects of importance to the dental assisting profession.	1. Partner with the Canadian Institute for Health Research (CIHR) to produce CDAA-led research.	1. Yvonne James, Researcher, CIHR; CDAA Board of Directors (incl. Knowledge Transfer Committee); CDAA ED	1. 2015	Consult with OMs to develop a research topic list.- <i>completed Jan 2015.</i> CDAA Board to evaluate CIHR proposal. <i>completed Mar 2015</i> Contract with CIHR to begin research project- <i>completed Mar 2015</i> Phase I of research. <i>completed June 2015.</i> Phase 2 - <i>August 2015.</i> Phase 3 - <i>October 2015.</i>	1. \$15K for research project; CDAA ED to oversee deliverables; CDAA Board to review deliverables and participate in research questionnaire development; dental assistants to participate in the research project.	1. Upon completion of the research (<i>estimated for Q3 2015</i>) post-mortem to be held by the Board and provincial associations on process, actionable items from the research's recommendations, publishing strategy.

Objective	Action Steps	Persons	Year	Milestones/ Completion	Resources Required	Evaluation
	2. Partner with the Canadian Dental Hygienist Association to utilize funds from the Penny Waite Fund (PWF) to fund a joint-research project.	2. CDAA Board of Directors, OMs, provincial associations,	2. begin 2015 with completion slated for 2016	<p>Initial discussions with CDHA completed; agreement in principle attained- <i>completed Mar 2015</i></p> <p>Research topics shared with CDHA & areas of common interest identified - <i>completed Jan 2015</i></p> <p>Next steps and consultation with 3rd party to be discussed in Q2 2015. <i>completed May 2015.</i></p> <p>Call-out for researchers <i>targeted for Q3 2015.</i></p>	2. Max \$25K from the PWF to fund research; volunteer dental assistant to participate in a joint research advisory committee; researcher; legal consultation on contract with CDHA; dental assistants to participate in the research; ED to oversee project for CDAA	2. Following the completion of the project, joint post-mortem between CDAA and CDHA on lessons learned and future collaboration. Joint-report to be provided to both Boards. Actionable items from the research's recommendations, publishing strategy.

Objective	Action Step	Persons	Year	Milestones/ Completion	Resources Required	Evaluation
	3. Develop a robust research agenda with financial support from all provincial jurisdictions	3. Stand-up of a CDAA Research Advisory Committee comprised of CDAA Board Members, OM representative, provincial association representative	3. 2016	3. Establishment of research funding model and agenda in consultation with provinces - <i>targeted Q3 2015</i> ; research funding agreements completed - <i>targeted Q3 2015</i> ; development of CDAA research list - <i>targeted Q4 2015</i> ; selection of CDAA research topic(s), - <i>targeted Q1 2016</i> ; contracts with researches finalized and research to begin <i>targeted Q2 2016</i> .	3. \$ (TBD) for research from all provinces; participation of dental assistants in all jurisdictions; legal consultation on establishing research funding model and to review contracts; volunteers to participate in the Research Advisory Committee; CDAA ED to oversee the research project;	3. Throughout project CDAA ED to provide status updates on progress, identifying areas of risk for slippage and on-target deliverables. Following the completion of the project, post-mortem on lessons learned and future collaboration. CDAA report to be provided to all provincial jurisdictions. Actionable items from the research's recommendations. Development of publishing strategy.

Objective	Action Step	Persons	Year	Milestones/ Completion	Resources Required	Evaluation
	4. Link corporate sponsorship to the PWF for the purpose of funding future research.	CDAA Knowledge Transference Committee; CDAA Board; CDAA OMs; CDAA ED; corporate contacts	4. 2015 & 2016	<p>Re-tool of the CDAA Awards - <i>completed Mar 2015</i></p> <p>Notification of changes to Awards to OMs and corporate sponsors- <i>completed April 2015</i></p> <p>Revision to CDAA corporate sponsorship levels -<i>targeted for July 2015</i></p> <p>CDAA corporate sponsorship package to be sent forward to corporate partners requesting sponsorship for 2016 -<i>targeted dissemination date summer 2015.</i></p>	4. CDAA ED to draft proposed changes to CDAA corporate sponsorship package; CDAA Board approval of revised package; mailout of package to corporate partners; follow-up on request for sponsorship	4. End of 2016 evaluation of corporate sponsorship revenues compared to previous years' sponsorship revenues.

2.2 To develop policies related to key issues related to the oral health profession/industry.

Objective	Action Step	Persons	Year	Milestones/Completion	Resources Required	Evaluation
To identify issues and topics of importance to the oral health industry.	Research and develop position statements related to issues and topics of importance to the oral health industry with a specific focus on those relevant to dental assisting.	In consultation with OMs and provincial associations, CDAA Board; CDAA ED; oral health industry partners.	2015 & 2016	Request topics for position statements from OMs - <i>targeted Q3 2015</i> Draft position statements for consultation - <i>targeted Q4 2015</i> Complete 2015 position statements & publish through CDAA website and Facebook page - <i>targeted Q4 2015</i>	CDAA Board, ED and OMs to engage in drafting of position statements.	Review existing position statements on an annual basis for relevancy and to ensure continued accuracy.

3. Capacity Building and Community

Specific Objectives:

3.1 To focus on effective communication with all provincial jurisdictions

Objective	Action Steps	Persons	Year	Milestones/Completion	Resources Required	Evaluation
To increase the quantity and quality of communication between CDAA, OMs and provincial jurisdictions.	1. Stand-up of CDAA's Facebook page with up-to-date, regular postings	CDAA Board + CDAA ED	1. 2015	1. <i>completed April 2015</i>	1. \$3600 for IT contract to link CDAA Facebook page to postings on website's Wordpress site. Updates to CDAA Website plug-ins. ED to update FB page as initiatives/project evolve.	1. Following 6 months (Q4 2015) request OM/provincial association feedback on Facebook posts and usage.
	2. Quarterly reports provided via email and letters to provincial associations, oral health partner and industry partners.		2. 2015 <i>and on-going</i>	2. each quarter of 2015 and 2016	2. ED to prepare update to provincial associations.	2. At end of year 1 (2015) feedback from report recipients to improve/ amend

Objective	Action Steps	Persons	Year	Milestones/ Completion	Resources Required	Evaluation
	3. CDAA ED to hold a one-hour per month conference call attended by all provincial associations to share issues they are facing in their regions. CDAA ED to provide de-brief to CDAA Board at monthly Board meeting.	CDAA ED + representative from each provincial jurisdiction.	2015 <i>and on-going</i>	Year-long call schedule to be established in Q3 of 2015. CDAA ED to invite representatives from each provincial jurisdiction to conference call each month on a set date – <i>targeted start date Sept 2015.</i>	Representatives to attend meetings. Conference call cost (\$) - through service provider.	Bi-Annual questionnaire to be prepared by CDAA ED and to be circulated to all participants to garner feedback on process and way forward. Report on feedback to be provided to CDAA Board.
	4. Produce an annual report at the fiscal year end (December 31) to be shared with each provincial jurisdiction.	CDAA ED with input from Board	December 2015 December 2016	Draft report including year-end financial statements to be submitted to Board for review in Q2 of subsequent year. Final report to be issued in Q3 following approval at AGM.	CDAA ED + Board members to draft report. \$\$ for graphic design/layout \$\$ for shipping of report to OMs and provincial associations.	Questionnaire to be circulated to report recipients to garner feedback.

3.2 To focus on activities in-line with a federated model

Objective	Action Steps	Persons	Year	Milestones/ Completion	Resources Required	Evaluation
To move CDAA away from activities with a member-service focus.	1. Sunset the CDAA Continuing Education program.	1. In consultation with OMs, lawyer, IT provider, ADAA, the CDAA Board and ED, to develop a plan to sunset the CDAA Continuing Education program in 2015.	1. 2015	Consultations, notification to OMs & service providers completed - Cont. Education to be taken offline - <i>completed April 1 2015</i> <i>Potential: offer CDAA Con. Ed to provinces to build up their offerings to dental assistants - targeted Q4 2015</i>	\$\$ for legal consultation; CDAA ED to consult on contractual obligations of service provider, ADAA, and IT.	3 months post-shutdown CDAA ED to provide update to Board on issues/ progress. Report to be shared with CDAA OMs upon Board approval.
	2. Re-tool the CDAA Awards package.	2. CDAA Awards Committee to review draft proposal; Board to approve Awards Committee recommendations	2. 2015	Awards draft package - <i>completed Dec 2014</i> ; CDAA Board approval - <i>completed Mar 2015</i> ; notification to OMs and corporate partners - <i>completed April 2015</i>	CDAA Awards committee evaluation; CDAA Board review of documents	Mid-year evaluation of receptiveness of corporate partners and organizational members to new awards package. CDAA ED to provide to CDAA Board

3.2 To focus on cost-saving initiatives in the administration of the Association in order to develop capacity to deliver on priorities given budgetary constraints.

Objective	Action Steps	Persons	Year	Milestones/ Completion	Resources Required	Evaluation
To reduce CDAA expenses to address budget constraints.	1. Break CDAA lease agreement and move CDAA to a virtual office model	1. CDAA Board + CDAA ED	1. 2015	Notice to break lease - <i>completed Mar 31, 2015</i> Move to virtual office - <i>targeted date Oct 1 2015</i>	\$14K to pay lease penalty + \$500 for storage of relevant office items in storage; ED + Admin to work remotely \$3400 annually for flex-office space	3 months post-move, CDAA ED to conduct a review of services and processes - report to be shared with CDAA Board and OMs
	2. Reduce paper office holdings and place office items in storage	2. CDAA ED + Admin in consultation with CDAA Board	2. 2015	1st and 2nd round of clean-up and shredding - <i>completed Feb and June 2015</i> Information Security Plan - <i>completed Feb 2015.</i> Review of cabinet contents on-going - <i>completion targeted for Q3 2015</i>	Budget of \$2000 to pay for offsite company to shred identified redundant documents ~\$100 per month to pay for storage of remaining documents/office items.	Incremental reports of what material has been shredded to be completed by CDAA ED and placed on file.

Objective	Action Steps	Persons	Year	Milestones/ Completion	Resources Required	Evaluation
	3. Streamline CDAA banking procedures and move to a e-payment process	3. CDAA ED to propose to CDAA Board amendments to cheque processing in accordance with Royal Bank Express platform	3. 2015	Presentation to CDAA Board - <i>targeted for Q4 2015</i> <i>Targeted implementation date Q4 2015</i>	Free, online training offered through Royal Bank for administrators, CDAA Executive	3 months post-move to virtual process, CDAA ED to conduct a review of services and processes - report to be shared with CDAA Board and OMs
	4. Move all paper holdings to Cloud in e-format	4. CDAA Admin with oversight from CDAA ED and in consultation with CDAA Board	4. 2016	Beginning in Q4 2015 and on-going - <i>targeted completion date of Q3 2016</i>	CDAA Admin in consultation with CDAA ED to systematically review and upload documents to Cloud \$1000 for Cloud storage IF amount exceeds no-cost threshold for Canadian NFPs	Incremental reports on what material has been uploaded to Cloud to be completed by CDAA ED and shared with CDAA Board and OMs

SUMMATIVE EVALUATION

A summative evaluation involves demonstrating that what has (or has not) been achieved insofar as a strategic plan is concerned. During the summative evaluation, CDAA's performance is rigorously examined with respect to whatever goals and objectives are outlined in the current strategic plan. In addition, the CDAA organizational tenets are evaluated to the extent to which values have been practiced, missions accomplished and visions achieved during the implementation of the activities outlined in this document.

The summative evaluation will be led by the CDAA Renewal Committee in consultation with CDAA Board of Directors, CDAA Executive Director, CDAA Organizational Members (OMs) and provincial associations who participated in the activities outlined in this strategic plan. The summative evaluation process will begin each year in January, following the fiscal year end of the last year of the current strategic plan (i.e. January 2017) and will be completed prior to the Annual General Meeting of the CDAA (June 2017). Evaluation findings, highlighting successes and noting areas for improvement will be formally presented to OMs at the CDAA Annual General Meeting.

The summative evaluation will be used to inform the subsequent cycle of strategic planning for the CDAA.