

2017 & 2018

Canadian Dental Assistants' Association Strategic Business Plan



FINAL – February 2017

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 2017 and 2018.

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EXECUTIVE SUMMARY

The CDAA Strategic Business Plan for 2017-2018 expands on the commitment of the Canadian Dental Assistants' Association (CDAA) to advance the dental assisting profession as it has for the past 71 years. Building upon the momentum of the 2015-2016 strategic business plan, this plan focuses on strengthening the long-term sustainability of the organization, both financially and with an eye towards activities that will have a direct, positive impact on the careers of dental assistants. Highlighted throughout this plan is the continued importance placed on the strength of the relationships with the provincial associations, both member provinces and otherwise. CDAA continues to be committed to open, transparent dialogue with all provincial jurisdictions and values the input from all across Canada in order to ensure the Association moves forward with the maximum amount of support possible. In addition to strengthening the domestic relationships across the profession, this plan further expands on the concept of collegiality and broadens CDAA's connections to dental assisting industry partners, oral health industry partners, both in Canada and abroad. CDAA will continue to mobilize concretely around these strategic directions as a cohesive unit in order to maximize available opportunities, address challenges and improve the profession of dental assisting.

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

2012: ODAA ceases to be a member of CDAA.

2013: DAEC ceases to be a standing committee.

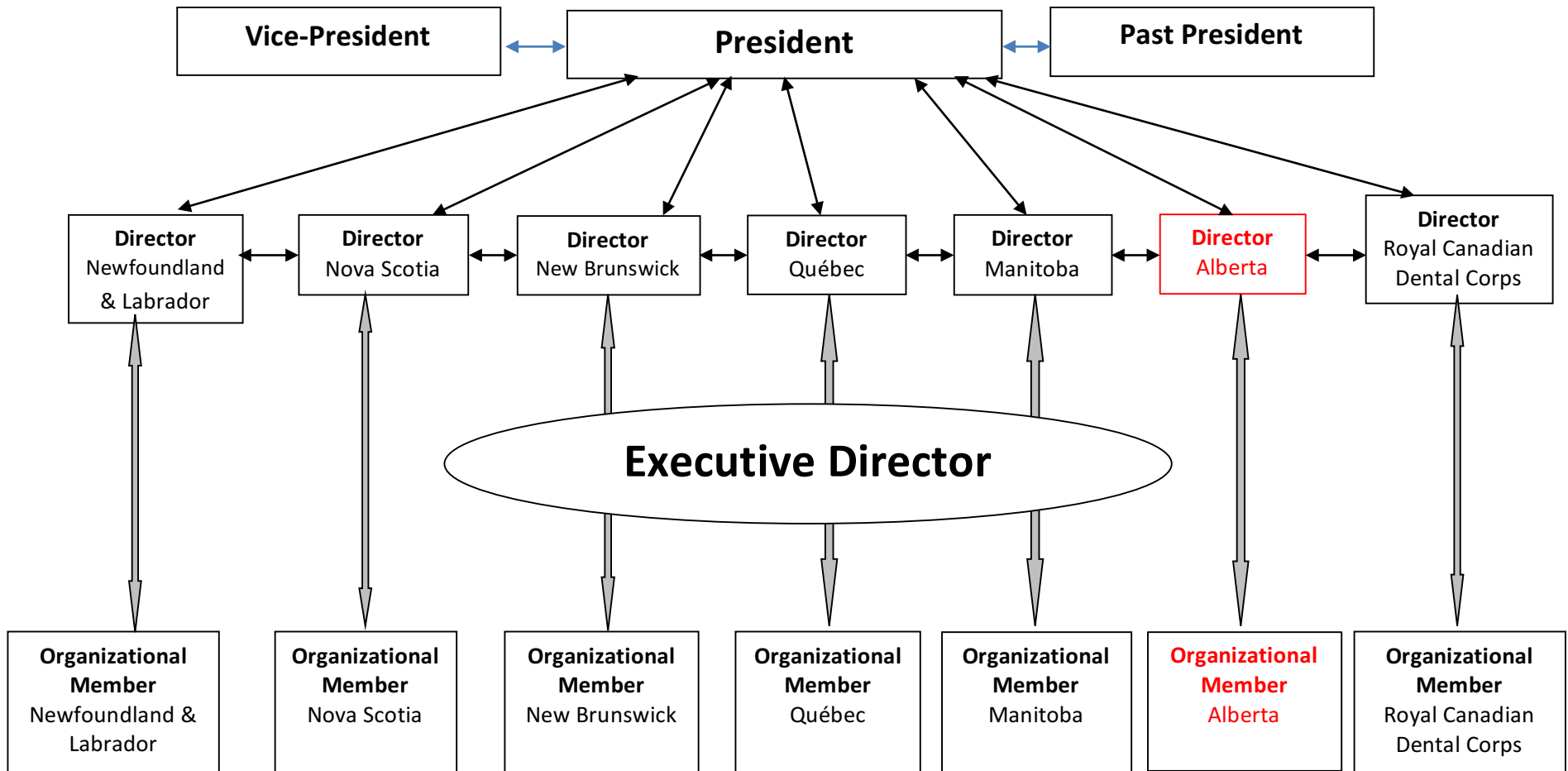
2014: SDAA ceases to be a member of CDAA.

2015: CADA ceases to be a member of CDAA. CDAA sunsets its online delivery of continuing education. CDAA focuses heavily on dental assisting research and launches a dental assisting research project reporting on stressors in the workplace.

2016: CDAA launches a joint research project with the CFDHRE on the impact to the hearing of dental assistants and hygienists.

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

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
- OM confidence in CDA continuing to grow
- strong internal governance structure - updated by-laws, clearly defined roles and responsibilities.
- committed, capable, efficient office support staff
- financial stability for the short-term (1-3 years)
- lower overhead costs given move to virtual/home office model
- strong policies and practices regarding internal financial controls – dual signatories, monthly financial statement reviews, etc.
- no long-term liabilities
- secure, financial investments exceeding \$85K
- internal control policies updated and implemented (i.e. GST policy/PIPEDA compliance)
- record management significantly improved (both soft and hard records)
- IT contracts established

External

- positive, strengthened relationship with oral health industry stakeholders
- positive, strengthened relationships with oral health industry partners
- actively pursuing opportunities for research specific to dental assisting
- positive perception of of the Association amongst industry partners, despite departures of 4 OMs in recent years, continues to improve
- perception of of the legitimacy of the Association amongst industry partners continues to improve given new proactive approach to policy development
- significant increase in invitations to participate on national level initiatives led by oral health industry partners and stakeholders
- 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

- 48% reduction in overall operating capital, effective 2016
- lack of operating funds results in reduced levels of activity and initiatives
- long-term planning is difficult due to the high impact OMs' internal decisions have on the Association
- no future IT plan (ie. website development/update)
- out-dated office technologies and equipment
- time commitment required of Directors results in low volunteerism at the OM-level

- small numbers on Board results in volunteering Directors taking on numerous roles in order to get job completed (i.e. President / directors on multiple committees)
- lack of strong succession planning for incoming Directors at the OM level
- President/Vice President/Past President terms only one-year in length
- low response rates from OMs to requests for feedback/consultation on initiatives and activities

External

- former OMs lack of confidence in Association's ability to deliver on key priorities and address previously highlighted issues
- historically poor relationships between some of the provincial jurisdictions and the national Association
- former OMs financial situation and/or internal strategic focus does not align with the national Association
- financial situation of some provincial jurisdictions does not allow for the financial support of 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
- continuation in the reduction of member-service related activities

- improving relevant policy development on an on-going basis
- improving respect for OMs' role in the federated model
- updating office technologies and equipment
- development of an IT plan with a focus on updating technologies/website
- moving towards an e-based system of records management to improve streamline and reduce costs
- update/streamline accounting and banking practices to improve efficiency and reduce costs

External

- strengthening linkages with former OMs
- formalizing agreements with former OMs to re-join the Association in some capacity
- improving communication and relationships with former OMs on initiatives and opportunities for partnerships
- strengthening of communication and relationships with Federal Government
- potential reduction in invitations to participate on national level initiatives led by oral health industry partners and stakeholders
- increase in invitations to participate on national level initiatives led by oral health industry partners and stakeholders
- 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

- 48% reduction in overall operating capital, effective 2016
- lack of operating funds to complete activities and initiatives
- 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
- arrival of new Board members in 2017 may reduce cohesiveness of Board
- 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
- 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 address the current needs of Organizational Members (OMs).	1. Assist and support membership recruitment efforts and activities in provincial jurisdictions (OMs).	Representative(s) from CDAA Board + CDAA Executive Director (ED) + Executive of Provincial Associations, as required.	2017 & <i>on-going...</i>	Dependent on needs/invitations/events of OMs.	Individuals to participate in meetings/recruitment events. \$ allocated dependent on number of events/invitations received from provincial associations	Provincial jurisdictions to provide data on increase in membership numbers resulting from recruitment activities
To address the current needs of former Organizational Members (OMs).	1. Develop agreements of affiliation with former OMs who are interested in re-joining CDAA.	Representative(s) from CDAA Board Executive (such as President or VP or Past-President) + CDAA Executive Director (ED) + Executive of Provincial Associations	2017 on-going into 2018	Consult with current OMs and develop agreement options/proposal <i>-target date Q2 2017</i> Present proposal to interested former OMs to negotiate new agreement <i>-target date Q3 2017</i> Finalize agreement <i>- target date Q2 2017 and</i>	Individuals to participate in meetings and ED time allocated to negotiations and preparation of correspondence. Legal consultation, if required.	Provincial jurisdictions to provide data on increase in membership numbers resulting from recruitment activities

				Q4 2017 Officially welcome former OMs in an affiliated capacity to CDAA – <i>target date Q1 2018</i>		
	2. Assist and support membership recruitment efforts in provincial jurisdictions for former OMs, who become affiliated with CDAA.	Representative(s) from CDAA Board + CDAA Executive Director (ED) + Executive of Provincial Associations, as required.	2017 & on-going..	Dependent on needs/invitations/events of OMs and affiliated former OMs.	Individuals to participate in meetings/recruitment events. \$ allocated dependent on number of events/invitations received from provincial associations.	Provincial jurisdictions to provide data on increase in membership numbers resulting from recruitment activities.
Objective	Action Steps	Persons	Year	Milestones/ Completion	Resources Required	Evaluation
To increase knowledge of issues facing dental assistants across all provincial jurisdictions.	CDAA ED to hold a one-hour per quarter conference call attended by all provincial associations to share regional issues.	CDAA ED + representative from each provincial jurisdiction.	2017 and on-going	Year-long call schedule to be established – <i>target date Q1 of 2017</i>	Representatives to attend meetings. Conference call cost (~\$100/mth) - through existing service provider.	Report on feedback to be provided to CDAA Board by ED during monthly Board conference calls.
To develop opportunities to partner on issues relevant to the profession with	Examples, such as but not limited to: 1. Compensation & Benefits	Representative of each Association + relevant CDAA committee	2017 and on-going		\$ Resources required will depend on the nature of the issue brought forward by provinces.	Evaluations on initiatives will be determined on a case-by-case basis.

associations regardless of their membership status in CDAA.	<p>2. Survey</p> <p>2. Development of policy/procedures regarding the future use of CDAA Continuing education courses</p> <p>3. Project with CDHA to improve workplace relationships within the dental office (resulting from the results of <i>the BCDAR</i>)</p> <p>4. Partner project with CDHA to improve awareness of role of DA versus hygienist in celebration of DARW week (2017) and Hygienist week (2017)</p>	and/or Director + CDAA ED, as required				
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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 become an operationally strong and	1. Review and amend the existing CDAA voting structure.	Representative(s) from CDAA Board Executive	2017 and on-going	Q1 2017 – review of options;	Individuals to participate in meetings and ED	

sustainable organization.		(such as President or VP or Past-President) + Members of Bylaws & Governance Committee + input from OMs and former OMs + CDAA ED		consultation with OMs/former OMs/industry; development of proposed options <i>Q2 2017</i> - review of options by OMs and former OMs; decision on way forward <i>Q1 2018</i> – implementation	time allocated to negotiations and preparation of correspondence.	
	2. Increase to membership fees for year 2018 Representative(s) from CDAA Board Executive + Members of Bylaws & Governance Committee + input from OMs +	2017 with implementation in 2018	<i>Q1 2017</i> – circulation of proposed increase to CDAA membership fees; <i>Q2 2017</i> discussion with OMs - <i>Q2 2017</i> vote by OMs	2018 implementation	Individuals to participate in meetings and ED time allocated to negotiations and preparation of correspondence.	
	3. Update and improve the security if the CDAA website.	CDAA Board + CDAA ED	<i>Q1 2017</i> provide CDAA Board with quote proposal <i>Q2 2017</i> -award contract and begin work	2017 implementation	\$ for update to website and \$ for security update throughout the year. \$8K allocation.	
To build the e-newsletter to become a useful tool for	1. “News from the Province” monthly e-newsletter insert	All provincial jurisdictions + CDAA Board + CDAA ED and	2017 <i>and</i> on-going	each month of 2017 and 2018	provincial associations to prepare; ED to coordinate	

dental assistants that is more inclusionary of all components of the profession		Staff				
	2. Invite industry partners to provide content to the e-newsletter	Industry partners(ie. NDAEB, CDAC, etc.) + CDAA Board + CDAA ED and Staff	2017 <i>and</i> on-going	Each month of 2017 and 2018	Industry partners to provide content; ED to coordinate	
	3. Invite international partners to provide content to the e-newsletter	International partners (i.e. France DA Assoc. + BDNS in the UK)	2017 <i>and</i> on-going	Each month of 2017 and 2018	International partners to provide content; ED to coordinate	
To participate in national level fora related to oral health.	Participate in/contribute to national level fora such as, but not limited to: 1. Canadian Oral Health Roundtable (COHR) and its related initiatives/policy development. 2. CDARA (April 2017 & 2018) 3. Can. Health Workforce Conference (Oct 2018) 4. JDIQ May 2017 & 2018 (dates <i>tb</i>) 5. CIHI statistical information project	Representative(s) from CDAA Board Executive (such as President or VP or Past-President) + CDAA ED	2017 <i>and</i> on-going	Endorsement/ of COHR draft Canadian version of Smiles for Life curriculum – <i>targeted 2017</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.

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	Participate in/contribute to national level fora	Representative(s)	2017	Endorsement/ of	Representative(s)	CDAA Board to

national level fora related to oral health.	such as, but not limited to: 1. Canadian Oral Health Roundtable (COHR) and its related initiatives/policy development. 2. Dental Assisting Regulatory Authorities meeting (April 2017 & 2018) 6. Canadian Health Workforce Conference (Oct 2018) 4. JDIQ May 2017 & 2018 (dates <i>tb</i> c)	from CDAA Board Executive (such as President or VP or Past-President) + CDAA ED	<i>and on-going</i>	COHR draft Canadian version of Smiles for Life curriculum – <i>targeted 2017</i> 	from CDAA Board Executive (such as President or VP or Past-President) + CDAA Executive Director (ED)	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	Participate in/contribute to national level fora such as, but not limited to: 1. Attend the Pacific Dental Conference in British Columbia (Mar 2017 and 2018) 2. Attend the Journée dentaire internationale du Québec (dates <i>tb</i> c May 2017 & 2018)	Representative(s) from CDAA Board Executive (such as President or VP or Past-President) + CDAA ED	2017 <i>and on-going</i>		\$\$ 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
To increase awareness of CDAA's objectives and initiatives	1. Quarterly reports provided via email and letters to provincial associations, oral health partner and	CDAA Board + CDAA ED	2017 & 2018	each quarter of 2017 and 2018 <i>on-going...</i>	ED to prepare updates and reports.	

amongst provincial associations, oral health partners, industry partners, dental assistants, government, internationally and the public.	industry partners.					
	2. Annual reports to be shared with industry partners	CDAA Board + OMs + CDAA ED	2017 & 2018	Annually distributed following approval of financial statements	ED to prepare report; Board to approve	
	3. To partner with CDA Oasis to share information and research and initiatives relevant to the oral health team.	CDAA Board + CDAA ED	2017 & 2018	As appropriate throughout the calendar year	ED to prepare communiqués; Board to approve and participate; CDA Oasis to engineer	
	4. To build a stronger relationship and foster information sharing and support between the CDAA and the National Dental Assisting Examination Board	CDAA Board + NDAEB ED + CDAA ED	2017 & 2018 and on-going...	As appropriate throughout the calendar year	ED to prepare communiqués; Board to approve and participate;	
	5. To build a relationship and foster information sharing and support between the CDAA and the British Dental Nurses Society (UK counterpart)	CDAA Board + BDNS Executive + CDAA ED	2017 & 2018 and on-going...	As appropriate throughout the calendar year	ED to prepare communiqués; Board to approve and participate;	

	6. To communicate regularly with Government on issues relevant to the profession.	CDAA Board + CDAA ED + Office of the Chief Dental Officer	2017 & 2018 and on-going...	As appropriate throughout the calendar year	ED to prepare communiqués; Board to approve and participate;	
	7. To continue regular postings on social media (newsbrief/FB)	CDAA ED + e-brief provider + CDAA staff	2017 & 2018	As appropriate throughout the calendar year	CDAA Staff to prepare; Board to approve	

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 position statements on subjects of importance to the dental assisting profession.	Completion of 6 position statements per calendar year relevant to current environment	Representative(s) from CDAA Board + Members of KT Committee + input from OMs + former OMs + CDAA ED	Each year: 2017 and 2018	Q1 2017: update position list; select 6 topics to research Q2 2017: begin research of selected topics Q3 2017: complete draft statements Q4 2017: publish final statements	Representative(s) from CDAA Board Executive + Members of KT Committee + input from OMs + former OMs + CDAA ED	

To initiate activities stemming from research related specifically to the dental assisting profession.	1.Partner with the Canadian Dental Hygienist Association to utilize findings from audiology research project to improve workplace of dental assistants and hygienists.	CDAA Board of Directors, OMs, provincial associations, CDHA, CFDHRE	Begin 2017 with completion slated for Q1 2018	<i>Timelines dependent on completion of research currently underway.</i> Initial discussions with CDHA; agreement in principle Next steps and consultation Definition of project terms.	ED to oversee project on behalf of CDAA; Board to approve activities.	
Objective	Action Steps	Persons	Year	Milestones/ Completion	Resources Required	Evaluation
	2. BCDAR Level II initiation and completion and launch	CDAA Board of Directors + OMs + provincial associations + industry partners + researcher + CDAA ED	2018 & beyond;	timelines based on fundraising outcomes of activities slated throughout 2017 and 2018	ED to oversee project on behalf of CDAA; Board to approve fundraising activities, research proposal and any subsequent activities.	
	3. Presentation of BCDAR at the JDIQ in Montreal	CDAA Board of Directors + AADQ + researcher + CDAA ED	May 2017	Q4 2016 – confirmation research presentation approved by JDIQ (completed) Q1 2016 – KT committee + researcher to develop presentation. Q2 2016 – presentation at JDIQ	ED to oversee presentation on behalf of CDAA; researcher to give presentation; minimal cost for ED to attend presentation in Montreal	

	4. Develop protocol related to the reporting of suspected family violence incidences.	CDAA Board + KT Committee + industry experts + OMs + former OMs + CDAA ED	2017	Q1 2017 – reach out to industry experts; develop draft Q2 2017 – <i>consult with OMs & former OMs</i> Q3 2017 – <i>present to Board for approval</i> Q4 2017 – <i>launch final</i>	ED to oversee project on behalf of CDAA; KT Committee to draft and finalize protocol	
	5. Develop toolkit for dental assistants to assist with employment choices and throughout their career.		2017 (an on-going as the intent would be for this document to be evergreen)	Consultations in Q1 2017; draft Q2 2017; Approval AGM 2017; Circulation Q3 2017.		Questionnaire to circulate via OMs/ provinces/CDAA FB page to gain feedback. Report to Board on future iterations in Q1 2018.

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.	Completion of 6 position statements per calendar year relevant to current environment	Representative(s) from CDAA Board + Members of Bylaws & Governance Committee + input from OMs + former OMs+ CDAA ED	2017 and 2018	Q1 2017: consult OMs to update position statement topic list Q1 2017: to select 6 position statements to research Q2 2017: to begin research and development of	Representative(s) from CDAA Board + Members of Bylaws & Governance Committee + input from OMs + former OMs+ CDAA ED	Review existing position statements on an annual basis for relevancy and to ensure continued accuracy.

				selected position statements Q3 2017: to complete draft position statements Q4 2017: to complete and publish 6 position statements		
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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/quality of communication between CDAA, OMs & provincial jurisdictions.	1. Maintain CDAA's Facebook page with up-to-date, regular postings	CDAA ED and Staff	2017 <i>and</i> on-going	As required throughout each calendar year	ED and CDAA Staff to prepare postings; Board to approve	
	2. Quarterly reports provided via email, oral health and industry partners.	CDAA ED	2017 <i>and</i> on-going	each quarter of 2017 and 2018	ED to prepare update to provincial associations.	
	3. Monthly "News from the Province" e-	All provincial jurisdictions; CDAA Board +	2017 <i>and</i> on-going	each month of 2017 and 2018	provincial associations to prepare; ED to	

	newsletter	CDAА ED and Staff			coordinate	
	4. CDAА ED to hold a quarterly conference call attended by all provincial associations to share issues they are facing in their regions. CDAА ED to provide de-brief to CDAА Board at monthly Board meeting.	CDAА ED + representative from each provincial jurisdiction.	2017 and on-going	call schedule to be established in Q1 of 2017.	Representatives to attend meetings. Conference call cost (\$) - through service provider.	Bi-Annual questionnaire to be prepared by CDAА ED and to be circulated to all participants to garner feedback on process and way forward. Report on feedback to be provided to CDAА Board.
	5. Produce an annual report at the fiscal year end to be shared with each provincial jurisdiction.	CDAА ED with input from Board	December 2017 December 2018	Draft report including year-end financial statements to be submitted to Board for review in Q2 of subsequent year.	CDAА 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 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 CDAА	1. Finalize the	CDAА Staff with	2018 and beyond	Completion of	CDAА Admin in	Incremental

expenses to address budget constraints.	move of all paper holdings, excluding financial, to electronic versions to reduce storage costs.	oversight from CDAA ED and in consultation with CDAA Board		initial research and associated costing options in 2017.	consultation with CDAA ED to systematically review and upload documents to Cloud. ~\$2.5K.	reports on what material has been uploaded to Cloud to be completed by CDAA ED and shared with the Board and OMs
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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 2019) and will be completed prior to the Annual General Meeting of the CDAA (June 2019). 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.