



Strategic Plan

“Building a Successful Future”

Introduction

The Executive Committee, Board of Trustees and the staff of the Colorado Dental Association (CDA) seek to develop a five-year roadmap for our organization. The Board of Trustees will review progress quarterly and will review and update the plan annually as needed.

The plan will be developed with broad involvement and guidance from the Board of Trustees, Executive Committee and staff. A Strategic Planning Committee, comprised of CDA leadership, staff and other board members, will hold work sessions to develop the plan while following the 10-Step Plan Schedule and reporting to the Executive Committee the following month with an updated written report.

Strategic planning is the process used by the CDA to envision its future and to develop the necessary structure, staffing, systems, operations, and procedures to achieve that identified future.

This vision for the future provides the association with the direction it needs to move forward and the inspiration and motivation it needs to begin that movement.

This envisioning process differs from fundamental long-range planning. It is the process of anticipating and influencing the future through proper preparation. Controlling the future is not the goal— the goal is to position the association to be creative, innovative, and in cooperation with the future. The strategic planning process, if implemented properly, can enable the association to create its own future.

Unlike conventional planning, which is influenced by current reality, our strategic planning process allows our vision to influence current reality. Our strategic planning process stands on desires and aspirations rather than limitations.

Executive Summary

The CDA is the professional association of dentists that fosters the success of a diverse membership and advances the oral health of the public as the recognized leading advocate for oral health in Colorado.

Our plan for the future involves three strategic areas: growing membership to reach the targeted CDA 2020 goals; creating organizational leadership around a strong, yet nimble organizational structure; and leading dentistry in Colorado through a changing and uncertain future.

It is important to recognize this plan is perhaps different than other strategic plans. Rather than a list of items to check off upon completion, the CDA Strategic Plan will help guide the organization through several fundamental changes, including leadership development, simplification of our governance structure and access to the highest quality of dental care for all Coloradans.

We have built the plan on the back of our mission and vision, both of which support the work of the American Dental Association. We recognize that we can't predict the future with certainty; but we believe that we can position ourselves as a strong, vibrant and forward thinking organization able to move successfully through uncertainty. We can also provide support to the 12 CDA components to help them meet their strategic goals.

Background and History

“Most early Colorado dentists were individualistic, content to exist by the broadest interpretation of *laissez faire* principles and suspicious of any effort to organize their activities.”

- William A. Douglas
History of Dentistry in Colorado
1859 – 1959

In 1873, there were enough dentists in the Denver area to make a realistic attempt at establishing a dental society—the Rocky Mountain Dental Association. Unfortunately, lack of interest caused this association to dissolve.

“On April 5, 1887, ten dentists held a meeting in Denver in the Fifteenth Street offices of Dr. J. M. Norman, where J. M. Porter was chosen temporary president and C. H. Bagley, temporary secretary. A committee was formed to arrange a professional meeting in the future and to determine the reputable dentists in the state and to invite them to attend. On June 7 and 8, 1887, the first official meeting of the Colorado State Dental Association (CSDA) was held. A constitution, by-laws, and a code of ethics were adopted; and the annual dues were set at two dollars.”

- William A. Douglas
History of Dentistry in Colorado
1859 – 1959

From these early days, the CDA has grown to more than 3,300 members with its headquarters at 8301 E. Prentice Avenue, Suite 400, Greenwood Village, CO 80111-2906. The CDA is a volunteer-driven association formed to provide a variety of membership services, based upon common interests. The association currently has a professional, paid staff of eight, and is comprised of 12 regional component societies.

Direction and Results

The strategic direction and goals included in this plan are the CDA's response to its understanding of what its members value most about the organization, and current opportunities and challenges to proactively serve and meet professional and related personal needs of member dentists and the oral health needs of Colorado communities.

The five-year period of this strategic plan will be a time of assessing and deepening the CDA's approaches to its work. Concurrently, the CDA will work to ensure that it remains the recognized leading advocate for oral health in Colorado.

With a fresh perspective on its mission, understanding what it does well, and the environment in which it operates, the CDA will pursue the following strategic objectives:

1. Ensure an Efficient and Viable Organization for the Future - The future of the CDA shall be defined by a strong and vibrant organization that is nimble and able to respond to the members.
2. Create the Infrastructure for Recruitment and Retention of Members - The CDA is committed to membership growth, leadership development and connecting membership to the best member benefits available.
3. Ensure Quality Dental Care for all Coloradans - The CDA is committed to working to increase access to care and support patient centered insurance reforms.

In setting forth the strategic issues, the Executive Committee set the following criteria as standards: must meet the mission, vision and core values of the organization; must be a large, organization changing goal; must be measurable and achievable; the organization must be willing to commit necessary financial resources to accomplish the goal; must have global member benefits; the objectives must be flexible enough to adjust to uncertainty.

A 10-Step Strategic Planning Process and Timeline

The CDA has adopted a ten-step strategic planning process and timeline referred to as the Strategic Change Cycle developed by John Bryson who authored *Strategic Planning for Public and Nonprofit Organizations*. The process is often referred to as a strategic management process and not just strategic planning. The process utilizes the following steps with the added timeline of accomplishment.

Step 1 – Initiating and Agreeing on a Strategic Planning Process – 2016 EC Retreat

Step 2 – Identifying Organizational Mandates – 2016 EC Retreat

Step 3 – Clarifying Organizational Mission and Values – 2016 EC Retreat

Step 4 – Assess the external and internal environments to identify strengths, weaknesses, opportunities and threats – 2016 EC Retreat

Step 5 – Identify the strategic issues facing the organization – August – September 2016

Step 6 – Formulate strategies to manage the issues – October – November 2016

Step 7 – Review and adopt the strategic plan or plans – December 2016 and January 2017
(BOT Adoption)

Step 8 – Establish an effective organizational vision – February 2017

Step 9 – Develop an effective implementation process – March – July 2017

Step 10 – Reassess strengths and the strategic planning process – July 2017 (2017 Leadership
Retreat)

Goals

The following goals for the CDA over the next five years are the organization's response to the important issues identified in the environmental scan that was completed as part of the strategic planning process. These goals provide a roadmap for fulfilling the strategic direction:

Ensure an Efficient and Viable Organization for the Future

- Streamline CDA bylaws
- Review of overall governance structure and make hard decisions
- Vertical leadership development across all levels of the Tripartite

Create the Infrastructure for Recruitment and Retention of Members

- Implement and meet the objectives of the CDA Membership 2020 Plan
- Create value to members by telling their story
- Transition CDA Endorsed Products into CDA Enterprises as a for-profit subsidiary
- Ensure the highest quality member benefits

Ensure Quality Dental Care for all Coloradans

- Lead the integration of dental into the whole health equation
- Expand accessibility and value of dental care
- Preserve high quality dental care

Organization of the Strategic Plan

As noted, this strategic plan is intended to be a management tool for the CDA. The plan has two purposes. First, it presents a comprehensive compilation of the goals and component parts. It is a record of the strategic planning process and the decisions reached by the Board of Trustees, Executive Committee and staff. Second, it is a reference guide for strategic planning. In the future, the CDA may choose to produce a summary version of the plan for distribution to its primary and supporting partners and other stakeholders.

VISION

The Colorado Dental Association is the Recognized Leading Advocate for Oral Health in Colorado.

The CDA is uniquely positioned to serve as the leading voice for oral health in Colorado. Our plan specifically incorporates a patient-centered healthcare focus through a desire to lead the integration of dentistry into the whole health equation, expanding accessibility and preserving the highest quality of care.

The CDA understands that while this plan is designed to navigate through the next five years, dentistry is going through dramatic changes that will take shape over the next few decades. In 20 years, the profession is expected to look significantly different than it does today. During the strategic planning retreat, the CDA envisioned several forward looking sceneries in which the profession had undergone radical changes. Nevertheless, the association was always a key factor in shaping the direction and adapting to the changes as the leading oral health advocate in Colorado, regardless of the practice model.

Advocacy is not constrained, as many define it, to the chambers of the Colorado legislature. It also includes advocating for our members and helping them succeed in their practices. We can do this by offering the best endorsed products and association programs. We can do this by using our philanthropic arm, the Colorado Dental Association Foundation. We can do this by telling the stories of our members and creating individual member value and raising the awareness of the profession.

Mission

The Colorado Dental Association is the professional association of dentists that fosters the success of a diverse membership and advances the oral health of the public.

The mission of the CDA can really be condensed to the following four words: Helping Our Members Succeed. Success in this plan is defined quite broadly. The CDA believes it can help its members succeed by providing high level continuing education (CE) and creating the opportunities for local components to provide CE to their members. The CDA believes it can help its members succeed by creating philanthropic opportunities to fulfill member's desires to give back to the community and leave a legacy for the future of the profession. The CDA believes it can help its members succeed by advocating for fewer unnecessary regulations and seeking to promote a business friendly environment. The CDA believes it can help its members succeed by offering the best affinity programs that meet the needs and standards our members expect from their association. Successful members better serve their patients and ultimately advance the oral health of Colorado.

The goal of the Colorado Dental Association is to ensure that our membership, volunteer leadership and staff represent a strong, vibrant and evolving model of diversity and inclusion for the dental community. In principle and in practice, the CDA values and seeks diverse and inclusive participation within the dental profession. The CDA promotes involvement and expanded access to leadership opportunity regardless of race, ethnicity, gender, religion, age, sexual orientation, nationality, or disability. The organization provides leadership and commits time and resources to accomplish this objective while serving as a model for diversity to all associations.

Core Operating Values

The members of the Colorado Dental Association believe in and endeavor to practice the following core values: Effective Leadership, Open Communication, Ethical Behavior, Moral Courage, Strong Advocacy, Fellowship, and Teamwork.

The CDA defines these terms as follows:

Effective Leadership – Leadership is an activity, not a position. The leaders of the CDA will not simply exercise leadership in their official capacity in the organization; they are expected to serve as a leader in the profession for their patients, staff, colleagues and communities.

Open Communication – The CDA believes in an open and honest dialogue among its members and with stakeholders. This includes transparency with its members regarding its organizational goals and strategic vision.

Ethical Behavior - Members of the CDA will adhere to the ADA Code of Ethics and strive to carry forth that behavior in all aspects of their public and personal lives.

Moral Courage – Sometimes leadership is difficult and risky. The CDA is committed through this plan to make tough decisions that lead to a stronger organization.

Strong Advocacy – The CDA believes firmly in strong advocacy at the Colorado legislature and will ensure that it has the highest level of representation available for the organization.

Fellowship – The CDA is united by the common element of individuals who are uniquely trained and hold the skill and license to practice the art and science of dentistry. This common bond creates a fellowship throughout the membership to work together internally to achieve our goals and objectives.

Teamwork – The profession shall work collectively and with external stakeholders to advance oral health in Colorado. The CDA, as the recognized leading advocate for oral health in Colorado, shall engage and lead discussions throughout the state.

Environmental Scan

The following is a brief summary of (S)trengths, (W)eaknesses, (O)pportunities and (T)hreats (SWOT) highlighted by the CDA Executive Committee.

Strengths

The key strengths of the CDA are:

1. Staff (detailed, experienced, dedicated, respected, good relationships)
2. Good membership market share
3. Strong advocacy system
4. Volunteer driven organization
5. Progressive
6. Diverse and passionate leadership
7. New dentists program
8. Office

Weaknesses

The key weaknesses of the CDA are:

1. Membership engagement within the components
2. Being relevant to the membership
3. Tripartite value
4. Communication to the average member
5. Overextended staff
6. Failure to keep up with financial trends
7. Lack of a good self analysis system
8. Budget implications of expanding staff
9. Technology challenges
10. Governance structure
11. Marketing functions to promote the House of Delegates to members
12. Fear of membership response causes organization to react/change slowly (governance type issues)
13. Diversity in Leadership

Opportunities

The Executive Committee identified the following specific opportunities:

1. Growth in CDA Endorsed Products to allow for additional staff hiring
2. Dental Health Matters as a means to become the “Leading Advocate for Oral Health in Colorado”
3. CDA Foundation creating new opportunities for engagement and support of CDA access to care goals
4. Growing membership substantially to increase revenue

Threats

The threats to the CDA are:

1. High demands on staff
2. High passion around 3rd party payer issues and anti-trust claims
3. Other legal risks

CDA Strategic Plan Outline

The following is an outline of the strategic issues and action steps identified in the strategic planning process.

Ensure an Efficient and Viable Organization for the Future

The future of the CDA shall be defined by a strong and vibrant organization that is nimble and able to respond to the members. This includes how we organize the association through the bylaws and how we allow for the organization to adapt to changes in policy. The CDA must be forward thinking and create a leadership and governance structure that meets the future needs of the organization.

- A. **Streamline CDA Bylaws**
 - a. Review CDA bylaws and separate policy from bylaws
 - b. Empower councils and committees to evaluate policy for Board of Trustee approval
- B. **Review Overall Governance Structure and Make Hard Decisions**
 - a. Evaluate Executive Committee structure and consideration of alternative Executive Committee composition
 - b. Evaluation of House of Delegates model and consideration of alternative models
 - c. Evaluate Board of Trustees structure and consideration of alternative board composition
- C. **Vertical Leadership Development across all levels of the Tripartite**
 - a. Identify current and future leaders and communicate with them through their leadership path
 - b. Conduct Annual Component President Leadership Workshop
 - c. Develop leadership track through component collaboration, councils, trustees and officers
 - d. Establish greater trustee orientation and mentoring

Create the Infrastructure for Recruitment and Retention of Members

The success of a membership retention and recruitment strategy is interconnected with the member services the organization provides. This strategy connects member benefits as the foundation for membership growth. Membership will incorporate both activities to grow the organization and the benefits the organization offers. The plan considers splitting the membership committee into Membership Recruitment and Retention, and Membership Services.

- A. **Implement and Meet the Objectives of CDA Membership 2020 Plan**
 - a. Develop better infrastructure around how potential new members are identified

- i. Establish a system to monitor applications for new dental licenses
 - ii. Work with dental supply companies and CU faculty to help identify new dentists
 - iii. Create a grassroots network of foot soldiers across the state who will identify new dentists in their communities
 - iv. Provide CDA staff oversight to coordinate and maintain accountability
 - b. Provide Membership Marketing Training starting with the Membership Council and moving outward from there to the Executive Committee and component leadership
 - i. Immediately identify a core grassroots network consisting of the Executive Committee, Board of Trustees and Alternate Trustees, component presidents and officers, and Membership Council
 - ii. Develop a grassroots membership marketing training system built on the CDA's core strategic goals of Governmental Relations, Dental Health Matters, the CDA Foundation, and CDA Endorsed Products
 - iii. Tasking members who have had that training to reach out to potential new members and "campaign for the CDA" - this will involve active engagement (phone calls, lunches, office visits, invitations and hosting at component meetings)
 - iv. Collaborate with MDDS on their membership campaign directed to new graduates and international students and provide education around CDA "talking points" and ADA membership initiatives
 - c. Expand organizational base by securing "commitments to volunteer" among members throughout Colorado
 - i. Identify grassroots volunteers to serve as eyes and ears to new dentists moving into their geographic representation area
 - ii. Expand training to foot soldiers so they are prepared to either implement strategy or connect with trained members
 - d. Implement and Engage Membership
 - i. Task members who have had training to reach out to potential new members and "campaign for the CDA" - this will involve active engagement (phone calls, lunches, office visits, invitations and hosting at component meetings).
 - ii. Outreach and cultivate member base and fully implement the campaign
 - iii. Continue to engage existing members at every opportunity
 - iv. Identify, and learn to identify through training, the emotional side of why members join and how to engage on those issues
 - v. Recognize volunteers to keep them motivated and keep morale high.
- B. Create Value to Members by Telling Their Stories**
- a. Incorporate more communication about individual members from a representative sample of current members and what they are doing in their communities
 - b. Recognize career milestones of members at Annual Meeting and through other communication channels and opportunities

- c. Share major milestones highlighting CDA/local component awards and accomplishments throughout the year
- C. Transition CDA Endorsed Products into CDA Enterprises as a For-Profit Subsidiary
 - a. Create CDA Endorsed Products Committee
 - b. Survey entire membership on endorsed products and overall satisfaction with member benefits
 - c. Communicate the results of the survey to our members and address the actions we plan to take regarding their concerns
 - d. Hire dedicated staff at appropriate levels to transition to CDA Enterprises (CDAE)
 - e. Rewrite CDAE Bylaws to reflect new goals of CDA Enterprises
- D. Ensure the Highest Quality Member Benefits
 - a. Ensure Peer Review meets the highest standard as a member benefit
 - i. Implement new procedural manual
 - ii. Establish satisfaction survey following the closure of a peer review case
 - iii. Conduct annual Peer Review workshop training

Ensuring Quality Dental Care for All

The CDA is the recognized leading advocate for oral health in Colorado. It is critical that the CDA works to ensure the highest quality of professional dental care to all Coloradans, regardless of where they live or how much money they have. The CDA is committed to working to increase access to care and creating greater patient centered insurance reforms.

- A. Lead the integration of dental into the whole health equation
 - a. Attain same priority for dental health as general health
 - b. Be proactive to avoid pitfalls of medical community
 - c. Preserve Medicaid dental benefits
 - i. Improve provider administrative efficiencies
 - ii. Advocate for fair reimbursement
 - iii. Increase or eliminate Medicaid annual maximum
 - iv. Advocate for provider recruitment incentives
 - v. Improve coordination of care for Community Dental Health Coordinators, emergency room referrals, seniors and school screenings
 - d. Preserve fair payment for dentists
- B. Expand Accessibility and Value of Dental Care
 - a. Reform insurance design and delivery of dental care
 - i. Redesign dental insurance so it better serves the patient
 - b. Innovate to deliver patient centered care
- C. Preserve High Quality Dental Care

Step 8 - Establish an effective organizational vision

These responses were derived from the CDA Executive Committee and Board of Directors

If the CDA is able to reach its full potential by accomplishing Goal #1, *Ensure an Efficient and Viable Organization for the Future*, what does that success look like in five years? How does that make us more effective as an organization?

- The governance restructuring in the CDA over the past five years has quickly energized and inspired members across the state to not just join the CDA, but to become active participants in the organization.
- Processes have been designed around the councils and committees and family of companies that have resulted in quicker and better decisions by defined decision makers. What was so often *paralysis by analysis* is now efficient decision making by highly engaged members with authority to act by the Board of Trustees. Councils and committee are now supported by issue specific ad-hoc committees that have more than doubled the number of members participating in the decision-making process.
- The roles of leadership are well defined at all levels of the organization. Member value is well defined and well known throughout the organization.
- A high functioning board, consisting of highly engaged and developed leaders at the constituent level, is now running the organization in concert with the Executive Director. A leadership development program has identified a dedicated core of members from the president down to the component committee members who are working to advance the CDA strategic plan for years to come. These leaders at all levels have been identified, are being developed and most importantly, are ready to work to better serve the membership.
- By stripping the policies from the bylaws, there is greater stability and consistency in the organization. Critical modifications to policies can now be made by those who have the fiduciary duty to the organization at the board level. The organization is now, some have said, running like a highly efficient business.

If the CDA is able to reach its full potential by accomplishing Goal #2, *Create the Infrastructure for Recruitment and Retention of Members*, what does that success look like in five years? How does that make us more effective as an organization?

- An increase in membership to more than 80% market share has allowed the CDA to grow and better serve the profession. A larger staff has resulted in improvements in membership knowledge, improvements in program design and increased our ability to serve the membership.
- Auto renewal of membership dues has freed up resources and increased the membership experience for millennials, now the largest demographic of the CDA membership.
- The market share increase has resulted in an overall increase in the bargaining power the CDA has in the marketplace. This increase in bargaining power has allowed the CDA to negotiate better rates on its endorsed products and has increased the value of its advertising plans. Bottom line, businesses want to work with the CDA and a part of the member experience like never before.
- As we have increased our market share, our organization has grown dramatically. More members has meant more contributions to CODPAC, the CDA Small Donor Committee and to the CDA Foundation. An increase in PAC support has giving us even more legislative clout, and increased donations to the foundation has allowed us to play an even larger role as the leading advocate for oral health in Colorado.

If the CDA is able to reach its full potential by accomplishing Goal #3, *Ensure Quality Dental Care for all Coloradans*, what does that success look like in five years? How does that make us more effective as an organization?

- The CDA set forth a vision in its strategic plan to be the Leading Advocate for Oral Health in Colorado. This goal not only meant leading the oral health conversation across the state through the CDA's Dental Health Matters campaign and its partnership with the CDA Foundation, it meant leading the profession through changes in the business model for the dentists.
- The CDA has been able to successfully measure the impact its efforts have had by increasing its metrics around access-to-care. These metrics have enabled the CDA to drive legislative policy to influence initiatives to support dentistry.
- The CDA recognizes that its members practice in many different settings, from private practice, to group practices, to public health and dental education. As the profession continues to integrate into medicine, the CDA has played a major role in supporting its members who are practicing in dental-medical integrated homes