



Professional Designations Program Implementation Plan

Heather Buchanan, Keiko Kuji-Shikatani & Brigitte Maicher

Professional Designations Core Committee

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IMPLEMENTATION PLAN

1. Approach

With review and decision on this proposal, the initiative moves from a project to a full CES service, requiring an appropriate CES infrastructure. It is suggested that the CES President and National Council endorse the appointment of a two year interim Vice President to oversee the implementation of the PDP, until CES by-laws can be changed and allow for an election for this post.

There is also a need for some paid, dedicated leadership to drive the implementation process. It is suggested a project manager be hired (through an RFP process) and report to the new, interim VP. This will alleviate some of the volunteer effort needed and allow the program to be up and running soon – keeping the momentum going.

PDP implementation will require action on:

- A. **Governance** – with the establishment of a VP for this new program on an interim basis, there is a need to modify CES by-laws and undertake an election for this new executive position. The VP may also wish to convene a small advisory group – key players from the project volunteers or Council who can act as a sounding board for the VP and Project Manager.
- B. **Staffing** – includes the need to engage a Project Manager, an Application Administrator and Credentialing Board members, each with different strategies for hiring. Details for these can be found broken down in the work plan which follows.
- C. **Process development** – has commenced during the project in drafting an Applicants Guide, Credentialing Board Guidelines and an Application Form (with an Applicant worksheet/tool). These vehicles need to be completed, validated and finalized. Depending on demand, there may need for a phased in approach on the intake process to manage work volumes. For example, the VP, PDP may decide to invite applications from CES members with initials A to K, or work from CES membership list and invite those with the longest tenure to apply first. In either case, the grand parenting provision needs to well communicated, especially the selected, time sensitive window for these applications.
- D. **Technology development** – is needed to create a ‘section’ within the CES website for the application process and CE registry. There is also a need to develop a new tier of membership within the CES membership data base and ensure renewals of CE members are channelled to the Application Administrator and not handled as are other CES membership renewals..
- E. **Communication and Marketing** – should be undertaken at the outset to clearly describe this new program to CES members and encourage applications. Modifications are needed to the current (an outdated CES brochure) and it is suggested a new



brochure on the CE be developed and issued to all members, as well as to key stakeholders. A communication/marketing plan to reach out to stakeholders in provinces should include/involve Chapters. During implementation, communication with Council and Executive is critical, and is suggested on a monthly basis, electronically and quarterly in writing.

There is a need to closely monitor and test the assumptions used to assign levels of effort for processing applications and renewals. The following table provides initial projections and these can be used in recruiting these positions. For example, if roughly 97 days are needed from the CB and applications are received in the last six months of 2009-10 (January to June of 2010), then recruiting 5 Credentialing Board members to start would mean they each commit to 3 days a month over that 6 month period. The Application Administrator and Credentialing Board members will need to maintain time logs initially to see how much time is invested in each application.

Level of Effort¹	Start up (Year One)
Administrator - 60 minutes p/application in start up year	1 hour x 316 = 316 hours or 42.1 days
Administrator – 15 minutes p/renewal	0
Inquiries, Registry and Website maintenance	4 hours p/week = 208 hours or 27.7 days
Total Administrator	524 hours or 69.8 days
Credentialing Board – one hour per application reviewed by 2 Members	2 x 316 = 632 hours or 84.3 days
Credentialing Board – 30% of applications require a third reviewer	316 x 30% x 1 hour = 94.8 hours or 12.6 days
Credentialing Board renewals	0
Total Credentialing Board	726.8 hours or 96.9 days

2. Costs

An implementation budget has been developed in the table below.

Variable Costs	Year 1
Administrator – per diem of \$412.50 (drawn from Willow costs for a Senior Client Manager)	\$17,380
Credentialing Board – per diem of \$500 - honorarium based compensation	\$48,696
<i>Variable Costs Sub Total</i>	<i>\$66,076</i>
Fixed costs	
Admin inquiries, registry set up	\$11,440
National Council member (new) – travel for 2 in-person Council meetings	\$3,000
Project Manager - implementation	\$30,000
IT – web site development, links to CES data base, forms and	\$20,000

¹ Calculations used 7.5 hours = 1 day.



Variable Costs	Year 1
communications	
Translation – web updates and communications	\$15,000
Supplies	\$5,000
Marketing	\$5,000
Evaluation – in year 3 @ \$25,000	\$5,000
<i>Fixed Costs Sub Total</i>	<i>\$94,440</i>
TOTAL COSTS	\$160,516

Based on the proposed cost for an application (\$385) and a projected demand of 20% of existing CES members (1580), revenue from the estimated 316 CE applicants would total \$121,660. This is a **shortfall of \$38,856.00** - which is the proposed level of *one time investment* by CES in PDP. From a budget standpoint for fiscal year 2009-2010, it is proposed the PDP reflect revenues of \$121,660 in fiscal year 2009-2010, operating expenditures \$121,660 and a one time expenditure/investment of \$38,856.

3. Timing

Implementation is planned over the upcoming fiscal year, from July 2009 to June 2010. Activities and tasks are planned in the following, tentative work plan. If the schedule is met – there would be a call for initial applications in December 2009, with the awarding of first CE's in January 2010.



WORKPLAN - PDP IMPLEMENTATION

Activities / Tasks	2009							2010						2010 - 2011	2011 - 2012
	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun		
Governance															
Approve PDP proposal															
Adjust CES by-laws															
Approve CES by-law changes															
Invite key players as advisors															
Call for VP, PDP nominations															
Conduct VP, PDP election															
Staffing															
Develop a Tor for the PM															
Solicit interest in the PM role															
Interview candidates															
Contract a PM															
Manage the PM															
Develop the Application Administrator job description															
Solicit interest in the AA role															
Interview candidates															
Select AA															
Manage the AA															
Invite Fellow & award winners to apply for CE															
Invitation for CB member															
Select CB members															
Orient/train CB members															
Process development															
Finalize application															
Finalize applicant guide															
Finalize CB Guidelines															
Develop application approach															
Invite / open to applications															
Make CE decisions															
Technology development															
Develop Tor for IT development															
Solicity interest															
Engage IT support															
Develop CE system															
Link to CES member data base															
Test system															
Communication & Marketing															
Letter to all CES on PDP															
Develop brochure															
Develop comm plan															
Obtain Chapter assistance															
Implement comm plan															