

ADA QUEENSLAND

FY2027 Operational Plan

OKR Framework — Final Draft

Status: working version — for manual review and team confirmation of targets, owners and dates

1. Status of This Draft

This is the sixth draft of the FY2027 Operational Plan. Draft 1 was the raw OKR synthesis from the four team planning sessions held 14–20 July 2026 and the “2026–27 Annual Operating Plan” Trello backlog (~90 cards). Draft 2 narrowed that to a recommended set of priorities and populated available data. Draft 3 added the three-year financial narrative and the January 2027 checkpoint. Draft 4 revised Pillar 1 to add the win-back Objective and make the membership-lifecycle logic explicit. Draft 5 incorporated a round of tracked-change edits and corrections. This draft closes out the two items left open from that round.

Anything marked “TBC — confirm with team” is a genuine gap rather than an oversight.

2. Strategic Anchor & Board Priorities for FY27

ADAAQ’s five-year ambition is to be Queensland’s recognised voice for oral health and the professional home of choice for dentists, delivered through four pillars: Member Value & Growth, Education, Leadership & Advocacy, and Operating Excellence. The Board and Management have named two priorities for FY27 specifically:

Financial sustainability — a three-year path, not a one-year fix

The Board’s goal, as previously discussed and supported in principle, is a return to genuinely sustainable surplus within three years (by FY2029) — not a single-year correction.

FY2026 provisionally closed at a loss of \$710,258 (unaudited). The FY2027 budget currently shows a loss of \$363,115, and may land up to \$100,000 higher depending on restructure and recruitment timing.

See Section 3 for the narrative distinguishing this as a strategic, investment loss rather than a continuation of prior inefficiency — and the checkpoint for testing that claim.

Membership growth

Membership grew +4.33% in FY2026 — the strongest four-year growth rate to date.

Penetration is reported at 58% on the working dashboard, but the Strategic Plan cites a Manager estimate of ~63–65% — this needs reconciling before FY27 targets are locked. (The gap is likely to be bridged by the 2026 graduating year joining as free Graduate members.) Horizon 1 (1–2 years) target is 70%.

3. Marketing & Communications Audit — Findings and Triage Status

An external function review (Communicate) assessed ADAQ’s marketing, sales and PR processes, alongside a social/EDM channel data audit and a member insights survey. In brief:

- Function: unclear role split between Izak and Martin, no standard request/briefing workflow, no crisis or issues-management framework, and no systematised evaluation approach.
- Channels: Instagram is the strongest engine for youth/graduate reach; LinkedIn is the most stable channel for B2B and advocacy content; Facebook performance is inconsistent; ad-hoc CPD flyer posts underperform; advocacy and community content are the strongest-performing themes.
- Member survey: the 3.32/5 value-for-money rating looks more like an awareness gap than a pricing problem — six priority actions were identified, from EDM reframing through to an early-career engagement pathway.

Priority tiers (from the audit snapshot)

Tier	Focus
Priority 1 (1–2 months)	Brand narrative, key messages and tagline direction; content-pillar strategy and calendar.
Priority 2 (3–6 months)	Brand refresh & style guide; branded template suite; content shoot (photo/video library).
Priority 3 (6–12 months)	Overarching positioning video; phased website UX/UI changes.
Priority 4 (12+ months)	Longer-horizon brand and platform investment, resourced once earlier tiers land.

Triage status

The audit’s recommendations have not yet been triaged against team capacity or the pending Manager appointment — that triage is still to be done. In the meantime, three things can proceed without waiting:

- Start the no-cost “quick wins” now: reframe EDM content around member impact; fix the website login friction on email click-throughs; re-engage the ~120 lapsed members (with separate outreach for the ~75% of recent graduates who lapse); push advocacy content through email as well as LinkedIn.
- Hold the structural recommendations — agency engagement, KPI redefinition between Izak and Martin, brand refresh — for the incoming Marketing & Communications Manager’s first 60 days.
- Schedule a full triage session once the Manager starts, to sequence Priority 1–4 items against the OKRs in Section 7.

4. Recommended FY27 Cross-Cutting Priorities

Leadership asked each team to focus on one or two high-impact initiatives this year rather than the full candidate list. Three signals were strong enough, and independent enough across sources, to recommend as org-wide priorities — the third now elevated in light of Management’s three-year financial narrative (Section 3):

1. One shared way to run a project (methodology + tool)

Raised independently in all four planning sessions — the Insurance/Renewal team wants a template “bible,” the weekly meeting discussed Monday.com, and the related Trello card has been overdue since 20 July. Five independent mentions of the same gap is the strongest single signal across the whole dataset.

2. Early-career conversion and onboarding

Appears in the Insurance team’s tracked metric, the join-page/onboarding work from the weekly meeting, and half a dozen Trello cards (mentoring groups, Grad Launch Pad, SIM Lab access). It also connects directly to the Board’s membership-growth priority — the clearest lever, given roughly three in four recent graduates currently lapse.

3. Partnership and sponsorship growth

Newly elevated in light of the three-year financial narrative (Section 3): real, revenue-generating industry connection is both a credible path to closing the FY27 budget gap and visible evidence of the broader reconnection with the profession the reset year is meant to achieve. The \$100,000–\$250,000 peer-branch benchmark against ADAQ’s current ~\$37,000 makes this a concrete, boardable target rather than an aspiration.

4. ADAQ is the home for the dental professional growth

RTO/CPD marketing visibility was named “the single most important initiative for the upcoming year” by the RTO team itself. Rather than compete with the priorities above for org-wide attention, it is carried as Education’s Objective 1 in Section 7.

Two decisions block progress on several of the above and are worth resolving in the first few weeks of FY27: the Marketing/Membership/Engagement restructure, and the PM tool choice.

7. FY27 OKRs by Pillar

Pillar 1 — Member Value & Growth

Strategic intent: make ADAQ indispensable to every Queensland dentist, at every career stage. Carries both Board priorities directly — growth, and the underlying membership base that supports financial sustainability.

Three objectives, one membership lifecycle

Objective 1 is the front door — converting graduates before they ever consider lapsing.

Objective 2 is the early warning — seeing disengagement coming while there's still time to act.

Objective 3 is the safety net — winning back the members who already walked away.

Together these cover the whole membership lifecycle, rather than reading as three disconnected initiatives — and Objective 3 quietly mirrors the same reconnection story running through the partnership objective in Pillar 4.

Objective 1 — Flagship | The front door: Make the first 18 months of membership the reason grads convert and stay.

Owner: Marketing & Membership/Engagement team, with Insurance & Membership and CPD (ownership pending restructure decision)

DEPENDENCY Assumes the Marketing/Membership/Engagement restructure decision has landed.

Key Result	Baseline	FY27 Target (proposed)	Owner	Due
Early Career Conversion rate lifted from baseline	~25% (member survey: ~75% of recent grads lapse)	Lift to ~35–40% in FY27, on the path to the 60% multi-year dashboard target	Marketing & Membership	Jun 27
Persona-based join page and sequenced onboarding journey (6-week/6-month) live	Not started	Live by end Q3	Marketing & membership	Mar 27
At least one grad-focused pilot delivered and tracked (mentoring group or SIM Lab intake)	None	1 pilot cohort launched & tracked	Membership / EDQ	Jun 27

Key initiatives

- Redesign the join page by persona (students, recent grads, general dentists, etc.), aligned to the Communicate report's six personas.
- Define and build the sequenced onboarding journey with multi-channel touchpoints.
- Scope and pilot a student/new-grad mentoring group
- Scope and pilot SIM Lab access for student/recent graduates
- Develop a priority program for graduate engagement and ADAQ awareness
- Documented strategic student membership engagement with clear success metrics-laying the groundwork for future membership,

Objective 2 | The early warning: See members clearly enough to act before they disengage.*Owner: Marketing & Membership/Engagement team, supported by Assist Team data***DEPENDENCY** Timing depends on the Causels engagement-scoring report and settled team ownership post-restructure.

Key Result	Baseline	FY27 Target (proposed)	Owner	Due
Engagement scoring model (out of 10) and staff-facing dashboard implemented	No scoring model exists	Model and dashboard implemented, live on member profiles	Membership	Nov 26
Baseline established for volume/type of simple member queries reaching the Assist Team	No baseline currently exists	Baseline established and reported	Assist Team	Sep 26
Active Engagement Rate lifted from baseline	TBC — confirm with team once scoring model is live	TBC — confirm with team	Marketing & Membership	Jun 27

Key initiatives

- Finish the engagement-scoring report with Darren and implement initial scoring.
- Build the staff dashboard view on member profiles — interpreted carefully, since long-term loyal members can show low engagement without being at risk.
- Develop and implement automation targeting low engagement score members- make member value more visible
- Run member mini-polling to sense-check the scoring model against real member sentiment.

Objective 3 — New | The safety net: Reconnect with the members ADAQ let drift away.

Owner: Marketing & Membership/Engagement team

Key Result	Baseline	FY27 Target (proposed)	Owner	Due
Structured win-back program launched for lapsed and former members	No coordinated outreach exists; ~120 identified lapsed members untouched	Program live — combining a targeted “Former Member Campaign” with an ongoing automated drip-feed sequence	Marketing & Membership	Dec 26
Reactivation rate achieved among contacted lapsed members	0% (untracked)	Proposed 10–15% in year one, supported by a rejoin incentive (14 months for the price of 12, already available in iMIS pricing)	Marketing & Membership	Jun 27
“Why did you leave” signal captured at the point of lapse	Not currently captured	Live for all new lapses, feeding directly into Objective 2’s engagement-scoring model	Marketing & Membership, with Assist Team	Mar 27

Key initiatives

- Launch the Former Member Campaign — show lapsed members what they’re missing, with the rejoin discount already built into iMIS pricing.
- Build the lapsed-member drip-feed as an ongoing automated sequence, not a one-off annual push.
- Prioritise the ~120 identified lapsed members from FY2026, and the recent-graduate cohort who didn’t convert (Objective 1), as the first cohorts through the program.
- Capture a simple exit signal at the point of lapse, closing the loop back into Objective 2’s engagement scoring so the same members are caught earlier next time.
- Automate personal qualitative research to understand reasons for leaving, and reasons for not renewing. Record and action.

Held in reserve for FY27: The corporate-membership feasibility review — dependent on settled team ownership post-restructure. The renewal-integrity and cash-flow items previously considered for this pillar (part-time membership category decision, ~\$180 stamp-duty write-off, BPAY review) have been moved to this backlog rather than dropped — the Causeis referral-link fix overlaps with the vendor review already underway in Pillar 4, Objective 1; the remainder can be picked up operationally by the Insurance & Membership Renewal team without needing to be a headline FY27 objective. Flag if you’d rather they sit elsewhere.

Dashboard metrics to watch: Membership Penetration (58% per working dashboard vs. ~63–65% Manager estimate — reconcile; Horizon 1 target 70%); Annual Retention (88% → 90%); Member NPS (target +45); Insurance Utilisation (68.8% actual).

Pillar 2 — Education

Strategic intent: be the education partner of choice, raising professional standards and financial sustainability together. Leadership of this pillar is transitioning to the new GM, Education — treat the below as a bridging FY27 plan.

Objective 1 — Flagship, the team's own #1 priority Make RTO and CPD visible and easy to choose.

Owner: EDQ and RTO

DEPENDENCY Owner shared with the incoming Marketing & Communications Manager — confirm once recruited.

Key Result	Baseline	FY27 Target (proposed)	Owner	Due
ADAQ ranks page 1 for core RTO search terms	Currently outranked by TAFE and Foundation	Page 1 ranking for priority terms	RTO / Marketing	Mar 27
Dedicated RTO/CPD marketing plan live	None	Live, with tailored student / employer / practice messaging	EDQ/RTO / Marketing	Dec 26
Existing video/testimonial assets actively deployed	Assets exist but unused	Active across ≥2 channels	EDQ/RTO / Marketing	Sep 26

Key initiatives

- SEO review for RTO/CPD search terms; unpack target audiences, messaging and calls to action.
- Increase social presence (Instagram, LinkedIn) with blogs and testimonials, per the channel audit.
- Explore Northern Queensland partnerships; participate in career days and school events.
- Cert III/IV enrolment growth- scoping interstate enrolments.
- Option for names to be included in surveys to identify those for testimonials.

Objective 2 Redefine what CPD success looks like, and prove it.

Owner: EDQ and RTO

Key Result	Baseline	FY27 Target (proposed)	Owner	Due
CPD success metric formally transitioned to “sold out / full capacity,” reflected on the Dashboard	“Breaking even” (old metric)	New metric adopted and reported	EDQ	Sep 26
ADAQ-specific CPD Logbook — go/no-go decision made	Scoping stage	Decision made	EDQ/Membership	Dec 26
Non-clinical CPD / video library launched	None	Launched	EDQ/Marketing	Jun 27

Key initiatives

- Redesign CPD program as professional growth essential, including utilisation of AI to develop new courses.
- CPD Advisory Panel terms of reference revised and Panel relaunched.
- Socialise the new CPD success metric with the team and update Dashboard definitions.
- Build the CPD Logbook business case; compile trend analysis to prioritise non-clinical CPD topics.
- Improve CPD survey response rate, and record/share results in real time.
- Introduce greater differentiation of CPD levels, leading to personalised learning pathways

Dashboard metrics to watch: CPD Market Share (target 50%); RTO Enrolment Volume (target 250); Education Financial Sustainability (target 1.00x break-even; currently ~85% SIM lab, ~70% lecture-room attendance); Cohort Access Breadth (target 35%).

Pillar 3 — Leadership & Advocacy

Strategic intent: be the authoritative voice for dentists in Queensland. Note: this pillar has not yet had a dedicated team planning session — the section below is built mainly from the Trello backlog and is thinner as a result. Recommend scheduling a session before finalising.

Objective 1 — Flagship Turn advocacy priorities into a visible, trackable program.

Owner: CEO and Office

Key Result	Baseline	FY27 Target (proposed)	Owner	Due
“Advocacy Top Three” priorities finalised and published	Not finalised	Published	President / CEO office	Sep 26
PAAC Terms of Reference approved	Draft	Approved	CEO office	Sep 26
Clear go/no-go reached on a Queensland Oral Health Alliance	Under consideration	Decision reached	CEO office	Dec 26

Key initiatives

- Continue monthly meetings with Ben Stute; map allied-stakeholder relationships, identifying priorities.
- Pursue MOUs with universities, other health professions and advocacy groups.
- Fold in the audit’s media-relations recommendations: key-message matrix, crisis/issues framework, media training for spokespeople.

Held in reserve for FY27: Patient-facing complaint-pathway content and public oral-health resources — worth keeping on the list, best sequenced after the dedicated advocacy session.

Dashboard metrics to watch: Member-Perceived Advocacy Effectiveness (target 7.0/10); Brand Recognition (target 65%); Media Share of Voice (TBC); Stakeholder Reach (target 15).

Pillar 4 — Operating Excellence

Strategic intent: build a high-performing, financially sustainable organisation. This pillar is the direct home of the Board's financial-sustainability priority.

Objective 1 — Flagship Resolve the team-structure and vendor-dependency questions holding delivery back.

Owner: CEO and office

Key Result	Baseline	FY27 Target (proposed)	Owner	Due
Marketing/Membership/Engagement restructure decision made and communicated	Undecided as at 20 Jul	Decided and communicated	CEO office	Aug 26
Marketing & Communications Manager recruited and onboarded	Recruitment underway	Onboarded	CEO office	Oct 26
General Manager, Education recruited and onboarded	Role approved 1 Jul 26; recruitment underway	Onboarded, succeeding the current Manager, Education & Quality	CEO office	Oct 26
Vendor dependency/turnaround risk documented (AIG, PSC, Causeis, Informs)	Undocumented; recurring delays reported	Documented with a mitigation plan	CEO office	Dec 26

Key initiatives

- Decide reporting lines for Leah and Darren, weighing finance-team fit against member-experience fit.
- Run both recruitment processes; brief each incoming manager on this plan as part of onboarding.
- Review Causeis invoicing, event usage and CPD logbook capability before further payment; resolve the Informs/Higher Logic PDF caching issue.
- Investigate Third-Party insurance sales platform, with decision made by December 2026.
- Marketing plan for insurance product agreed and implemented for Q3 (January-March 2027).

Objective 2 — Flagship, newly elevated **Rebuild real, revenue-generating connection with industry through partnerships and sponsorship.**

Owner: CEO office/marketing and Communications

BOARD PRIORITY Directly answers the Board’s FY27 partnership-growth priority and the revenue-diversification gap in Section 8.

Key Result	Baseline	FY27 Target (proposed)	Owner	Due
Sponsorship & partnership revenue lifted from current base	~\$37,000 (FY26) — well below the \$100,000–\$250,000 p.a. benchmark reported at comparable branches	Lift to \$75,000–\$100,000 in FY27, as year one of a multi-year climb toward the benchmark range	CEO office	Jun 27
Partner/sponsor engagement strategy and stakeholder matrix developed (per the marketing audit)	No formal strategy; ad hoc approach	Strategy and matrix in place	CEO office/Marketing	Dec 26
Number of active, meaningfully-engaged industry partnerships increased (beyond one-off sponsorship)	TBC — confirm current count with team	TBC — confirm with team, informed by peer-branch benchmarking	CEO office / Marketing	Jun 27
Growth in number of members for ADAQs Insurance product	1798 insurance members (143 interstate)	5% growth in overall (90) and 10% interstate (14).	Assist/Marketing	Jun 27

Key initiatives

- Benchmark peer-branch partnership models and revenue mix to size realistic, structured partnership tiers.
- Build the stakeholder/sponsor matrix and engagement plan recommended in the marketing audit.
- Use existing convening moments (golf day, ACE conference relationships, Clinic Day) as first partnership touchpoints.
- Treat early traction here as a named piece of evidence for the Board’s January 2027 checkpoint (Section 3).

Objective 3 — Flagship Give every team one shared way to run a project.*Owner: CEO office, applied org-wide*

Key Result	Baseline	FY27 Target (proposed)	Owner	Due
Standard one-page PM template adopted for 100% of new projects org-wide	No standard template; related Trello card overdue since 20 Jul	100% adoption on new projects	CEO office	Sep 26
PM tool decision made and piloted on one live project	Under discussion (e.g. Monday.com)	Decided and piloted	CEO office	Oct 26
Formal checkpoint/sign-off process applied to the FY27 renewal project as proof point	Ad hoc	Applied	CEO office	Mar 27

Key initiatives

- Draft and circulate the standard PM template (stakeholders, acceptance criteria, milestones, comms plan).
- Define shared methodology before tooling, so the chosen tool is actually effective.
- Document operational policies and procedures; begin process mapping and review.

Objective 4 Strengthen the governance and risk foundation ahead of the AGM cycle.*Owner: CEO / Board office*

Key Result	Baseline	FY27 Target (proposed)	Owner	Due
Updated risk framework and risk register enacted	Outdated	Enacted	CEO / Board	Nov 26
Financial Governance and Delegations Policy approved	Draft	Board-approved	CEO / Board	Nov 26
President Transition Plan and revised director-nomination process completed	In progress	Completed ahead of AGM	CEO / Board	Ahead of AGM

Key initiatives

- Finalise and enact the overarching risk policy and register.
- Complete the President Transition Plan; run the revised director-nomination process, including a pre-nomination webinar.
- Complete the privacy review and WHS review.

Dashboard metrics to watch: Operating Surplus (target: as per budget — FY27 budget currently still a deficit, see Section 8); Revenue Diversification Ratio (target 45%); Financial Reserves Ratio (target 4.0 months); Staff Engagement Score (currently –0.25 vs. target 0 — worth watching given the restructuring underway, and tracked as a leading indicator for the January checkpoint); Strategic Initiative Delivery Rate (target 80%).

8. Financial Sustainability Snapshot

	FY2025	FY2026 (Provisional)	FY2027 (Budget)	FY2027 (Planning scenario)
Total revenue	\$4,024,004	\$4,301,375	\$4,750,764	\$4,750,764
Total expenses	\$4,546,698	\$5,011,633	\$5,113,879	\$5,213,879
Net surplus / (deficit)	(\$522,694)	(\$710,258)	(\$363,115)	up to (\$463,115)

Read against the three-year arc in Section 3, FY2027's budgeted loss is the planned cost of the reset — not a fourth consecutive year of the same problem. For planning purposes, the Board should treat the loss as being as high as \$463,115 rather than anchoring only to the \$363,115 budget figure, given the restructure and two senior recruitments still in train. The test of whether this is a legitimate strategic loss, rather than a continuation of prior drift, is the January 2027 checkpoint (Section 3) — not the size of the number alone.

Revenue diversification is a genuine risk area, not just a target on a dashboard: sponsorship & advertising revenue has fallen from \$184k (FY18) to roughly \$37k (FY26) — well short of the \$100,000–\$250,000 typical of comparable branches — and management-fee and training revenue lines are broadly flat to declining as a share of the total. This directly underpins the Revenue Diversification Ratio target (45%). Partnership and sponsorship growth (Pillar 4, Objective 2) is the single most immediate lever to close it, alongside the corporate-membership feasibility review (Pillar 1).

Employee costs are budgeted at \$2,764,548 for FY27 — around 54% of total expenses, broadly stable as a ratio across the last few years. Cost growth is not the primary driver of the gap; revenue recovery is — which is precisely why partnership growth carries as much weight as it does in this draft.

9. Proposed FY27 Sequencing

An indicative quarter-by-quarter view, to be refined once owners and dependencies above are confirmed. Note the January 2027 checkpoint sitting between Q2 and Q3 — the point at which the Board tests the reset-year narrative against the evidence in Section 3.

Quarter	Focus
Q1 Jul–Sep 26	Lock the two blocking decisions (restructure, PM tool); publish Advocacy Top Three; transition CPD success metric; start no-cost marketing quick wins; open GM Education and Marketing & Comms Manager recruitment.
Q2 Oct–Dec 26	Onboard both new managers; document vendor dependency risk; approve governance/risk policies ahead of AGM; RTO/CPD marketing plan live; CPD logbook go/no-go.
Q3 Jan–Mar 27	Persona-based join page and onboarding journey live; PM checkpoint process proven on the FY27 renewal project; RTO page-1 search ranking push; renewal documentation live.
Q4 Apr–Jun 27	Grad-focused pilot delivered and tracked; early-career conversion reviewed against target; non-clinical CPD library launched; FY28 planning kicks off.

January 2027 — Board checkpoint

Formal review of the criteria set out in Section 3 against actual progress: restructure and recruitment complete, Project Management discipline adopted, partnership pipeline showing early traction, CPD/Advocacy Objective-1 milestones delivered, Staff Engagement Score trending up.

Outcome: confirms the reset is on track for the three-year arc, or triggers the Board’s alternative-approach conversation.