

CDA

**GENERAL ASSEMBLY
April 2023
Annual Reports**

2023 General Assembly Agenda

Call to order
Pledge of Allegiance
Candle lighting in honor of Juliette Southard
Invocation
Presentation of Executive Committee
Introduction of Guests
Dedication
Recognition of CDAA Past Presidents
Membership Awards
Correspondence
Convention Committees
 Credentials
 Elections
 Timekeeper
 Read the Minutes
 Reference
Convention Rules and Program
Credentials Report
Recognition of 1st time Attendees
Recognition of Life Members
Recognition of Local Presidents and Directors
Board Report Addendums
Resolutions/Bylaws
Presentation of 2023-2024 Budget
Nominating Committee Report
Election of Officers
Recognition of Retiring Officers/Board Members
Selection of Nominating Committee for 2023-2024
Unfinished business
New Business
President's Address
Announcements
Adjournment

Mission Statement
To Advance and Enhance the Profession of Dental Assisting

OFFICER REPORTS

President

Zeña Delling
March 2023

Directives (from previous meeting/s, if any): **None**

Activities (driven by the MOP):

Description:

February 22, 2023, I had a Strategic Plan Meeting with our Committee Chair, Wendy Pio, and the committee. We reviewed our plan to see what progress has been made and what tasks need to be worked on. Wendy asked me to lead the meeting since she was not feeling well.

Weekly I attend:

Alliance meetings-The Alliance includes CADAT's President Melodi Randolph, CDAA Claudia Pohl, CDAA GR Chari Shari Becker, CDAA President Zena Delling, and RDAEF Association Joan Greenfield. Currently, we are working with the CDA to Amend their bill AB 481.

Conference Team Meetings- This team includes CDAA Claudia Pohl, CDAA Chair Shari Becker, CDAA President Zeña Delling, CADAT Susan Dahn, CADAT's President Melodi Randolph. We have a list of things that need to be done, and we are constantly updating our accomplishments and working on completing the next tasks. For example: Claudia Pohl and Susan visited different hotels and found one that would fit our needs. Shari Becker and I have worked on getting our speakers and sponsors. Melodi Randolph is working on the CADAT's website to deliver the CEU's to our annual conference guests. This is just a touch of what is done at our meetings.

Wednesdays with Claudia Pohl- We meet to discuss current and future tasks that need to be done.

Other Activities:

Description:

March 13, 2023 I sent an email to invite the following presidents to our CDAA Business Meeting Fiesta:

ADAA President MaryBeth Sojka-Unfortunately she is unable to attend. I wrote President MaryBeth to ask if she can send greetings to present at the CDAA Business Meeting Fiesta. She has not responded.

CADAT President Melodi Randolph-Melodi Randolph will be attending our Business Fiesta

CDA President John Blake, DDS-Dr. Blake will be attending our Business Meeting Fiesta.

CDHA President, Kathy Kane-Has not responded.

DLOAC President Jean Chiha-Pending

November 14, 2022-Attended a Dental Board Meeting to offer support to CDAA GR Chari Shari Becker.

February 17, 2023, I set up a Meeting for CDAA Corporate Development Coordinator Shari Becker and myself to meet with a potential Sponsor, Adrian Collins Company, "The Batch. The meeting went really well, and we have another meeting on March 31, 2023. Stay tuned for more details.

I have attended multiple Corporate Development meetings with Shari Becker to work on getting more sponsors.

Other Information Future meetings:

Christy Burton 1 VP to work securing volunteers from OCDAS for membership booth for Anaheim Convention. Work on a strategic plan for ideas on how to increase membership and reach out to past members.

Wendy Pio 2nd VP to set up next strategic plan meeting

Linda Willyerd, Education Chair to work on future courses for our association.

Shapri Hawes-To supports her as she starts a new local in Los Angeles.

Communication sent to you or by you as CDAA President:

February 15, 2023- I contacted Abby Teh to ask if she would like to change positions on our CDAA Board. I offered some ideas.

February 22, 2023- I spoke to our CDAA Secretary Jennifer Bierschbach to ask if she was interested in staying on for another year or she would like a break. We discussed it a little further.

February 25, 2023- Spoke with Abby Teh, and she accepted the position as CDAA Secretary.

March 19, 2023- I spoke with Kristina Gegamian to hear her progress as our Nomination Chair. I offered some help with her efforts to secure candidates for our CDAA Board positions.

March 23, 2023- I spoke to Carmen Khuri to ask her if she would be interested in serving as the CDAA Nomination Chair, she accepted.

At our business meeting, I will be appointing Carmen Khuri as CDAA Nomination Chair for 2023-2024

I wrote two articles:

November 2022- Volunteering Opportunity for the CDAA President:

March 2023- What could be the cause of the Dental Assistant Shortage Today?

Strategic Plan Activity:

1. Contact members in where the locals have disbanded to see if they would like to take it over.
2. Contact High Schools to speak at their school to promote dental assisting.

Calendar of Future Events on Agenda:

- Date: March 31, 2023
- Description of Event: Corporate Development Meeting -Shari Becker, Zena Delling, and Adrian Collins Company, "The Batch."

- Date: CDAA/CADAT Annual Conference
- Description of Event: April 21-22, 2023
- Date: May 18-20
- Description of Event: CDA Presents Anaheim

1st Vice President

Christy Burton
April 2023

Directives (from previous meeting/s, if any):

I signed the CDAA up for a booth space for the CDA Convention in San Francisco back in September 2022. They have our insurance and registration forms. Shari, Zena, myself, Wendy Pio, and two other ladies from Shari's local dental assisting society helped out at the booth.

I have also signed the CDAA up and sent in the insurance forms for the Anaheim convention as well as signed us up for the CDA convention in San Jose for next fall as well to reserve us a booth.

I will figure out the booth sign up times for Anaheim next month when we know more.

Activities (driven by the MOP):

Description: I attended the CDA Convention in San Francisco. Consistent traffic came through. Met many new RDA'S and had a great time.

Description: I was asked by the strategic committee to come up with a few ideas on how to increase membership.

Sign and Update: Confidentiality Agreement and Conflict of Interest Forms for the CDAA in July 2022.

In person CDA Convention in San Francisco. This will be the last one in SF. Next year it will be in San Jose, Ca for the northern convention. San Jose will be

Anaheim Convention May 18-20. I will be there holding down the booth and hoping to sign up new members and field questions from many dental professionals.

Other Information about your committee (needs, requests . . .):

Communication sent to you or by you as Committee Chair:

MOP (Additions, changes, updates you think are needed?)

Strategic Plan Activity: (specific Goal and Objective number, eg 2-1):

As the VP 1, I am part of the membership committee and I have been directed to some strategic plan activities which are in my membership report.

Calendar of Future Events for this Committee:

Questions or Concerns about your committee?

Suggestions / Recommendations to CDAA BOD:

2nd Vice-President

Wendy Pio, CDA, RDA, BS
April 2023

Directives (from previous meeting/s): Host/Attend Strategic Planning meeting with members of the committee. Meetings were held March 22nd and March 24, 2023. Present gift to CDAA President at Joint CDAA/CADAT Annual Session in April 2023.

Activities (driven by the MOP):
Description: See above

Other Information about your position (needs, requests . . .): None

Communication (e.g. invitations, requests specific to this position . . .):
Set up ZOOM meeting to work on new Strategic Plan. Email chairs of each committee which includes Education, Budget and Finance, Membership and Government Relations. Also, included Student Outreach Chairperson.

Strategic Plan: Committee shall be composed of five (5) members. Four shall be elected by the BOD serving a two (2) year term. Two (2) to be elected each year. The 2nd Vice-President shall serve as Chair of this committee. The Immediate Past President shall serve as an Advisor.

It is recommended that members of this committee include the Chairs of Education, Budget and Finance, Membership and Government Relations Committees.

Calendar of Future Events (specific to this position):
As Chairperson of Strategic Planning Committee, organize future meetings (ZOOM). Facilitate collaborative meetings regarding moving forward with 2022-2025 Strategic Plan.

Questions or Concerns about your committee: None

Suggestions / Recommendations to CDAA BOD:
Distribute the final draft of the Strategic Plan as developed by the committee. Request input and suggestions be submitted and discussed at future BOD/Annual Session meeting.

Secretary

Jennifer Bierschbach

March 2023 - Annual Report

Directives (from previous meeting/s):

1. All members to take photos and send to Staff/President (Summer).

Activities (driven by the MOP):

Description:

- Attended (virtually) CDAA's Annual Session, Post-Board, Summer, Fall, and Winter Board of Directors meetings, and generated minutes from each meeting.
- Sent ADAA the Officer and Information form on June 6, 2022.
- Updated Signatory information at Chase – June 24, 2022.
- The following is the status of Local Officer Forms and IRS Post Cards:

The following Local Officer Lists are current as of 1/17/2023:

Diablo

Fresno-Madera

Marin County

Orange County

Pomona Valley

San Diego County

San Fernando Valley

Santa Clara County

The following officer lists are expired:

San Francisco County

San Gabriel County

The IRS filing postcards on record that are current as of 1/17/2023:

Diablo

Marin County

Orange County

Pomona Valley

San Diego County

San Fernando Valley

San Francisco County

San Gabriel County

Locals that are past due to file are:

Fresno-Madera

Santa Clara County

Other Activities:

Description: None to report.

Other Information about your position (needs, requests . . .): None to report.

Communication sent to you or by you as an Officer (eg. invitations, requests specific to this position . . .): None to report.

MOP: None to report.

Strategic Plan Activity: None to report.

Calendar of Future Events (specific to this position):

Date: April 22, 2023

Description of Event: Attend 2023 Annual Session

Questions or Concerns about this position? None to report.

Suggestions / Recommendations to CDAA BOD: None to report.

Thank you all for your generous support!

Immediate Past President

Kelly Thomas
March 2023

Directives (from previous meeting/s):

- Create a volunteer agreement (in progress)

Activities (driven by the MOP):

- Attended BOD meetings
- Responded to emails

Other Activities:

- Met with Shari Becker regarding scholarship program

Other Information about your position (needs, requests . . .):

- none

Communication sent to you or by you as an Officer:

- none

MOP

- none

Strategic Plan Activity:

- none

Calendar of Future Events (specific to this position):

Date: TBD

Questions or Concerns about this position?

- none

Suggestions / Recommendations to CDAA BOD:

- none

DIRECTOR REPORTS

Diablo Dental Assistants Society (CA08)

Shari Becker, CDA, RDA, FADAA
Annual Report/ April 2023

Directives: None

Activities:

DDAS board meetings were held throughout the year. Our board consists of:
President/Treasurer/Director: Shari Becker
Secretary: Yvonne Vanni
Ways and Means: Kristin Munk
Elections of new officers to be held in May 2023

Other Activities:

Education meetings:

December 10, 2022- 4 Units of CE-23 attendees

Student Appreciation event

Blue Star Mom's donation for community service

March 18, 2023- 4 units POP up class (short notice)- 8 attendees
IC/CDPA Zoom

March 24, 2023 – 4 units POP up class (short notice) 5 attendees
IC/CDPA live in person.

Other Information about your position: Elections to be held in May 2023. DDAS has made donations to GR to help fund the lobbyist.

Communication: Meetings regarding the dental assisting shortage are being held with the Contra Costa Dental Society special committee. DDAS in conjunction with local dental assisting educators and program directors are involved.

MOP: None

Strategic Plan: We have been offered to hold educational meetings at Loma Vista Adult Education campus and will be utilizing that offer next year. We hope to have education courses offered both live and virtual for the coming new year. We also hope to hold some leadership training and forums to encourage membership and leadership within our community and with the student members.

Calendar of Future Events:

Date: April 21-22, 2023

Event: CDAA annual conference BOD meeting

Questions or Concerns about this position: None

Suggestions / Recommendations to CDAA BOD: We need to work on recruitment for our membership, students, and teachers.

Membership data for March 2023

Total members:55

PRO: 27 Life: 3 Student:18 NPRO1: 7 NPRO2: 0 NPRO3: 0

Membership data for March 2022

Total members:71

PRO: 36 Life: 3 Student:27 NPRO1: 3 NPRO2: 1 NPRO3: 1

Fresno-Madera Dental Assistants Society (CA04)

No Director

Education Meetings:

Activities (eg membership recruitment, fundraising, community service):

Other Information about your local (eg.changes in leadership, raffles, rosters)?

Calendar of Future Events:

Communication (eg. invitations, requests specific to your local . . .):

Questions or Concerns about your local?

Suggestions / Recommendations to CDAA BOT:

Website, if any:

Membership data for April 2023

Total members: 31

PRO: 4 Life: 7 Student: 20 NPRO1: 0 NPRO2: 0 NPRO3: 0

Membership data for April 2022

Total members: 48

PRO: 4 Life: 7 Student: 28 NPRO1: 6 NPRO2: 2 NPRO3: 1

Marin County Dental Assistants Society (CA 16)

Christy Burton – President/ Director
CDAA Annual Meeting April 2023

Education Meetings:

April 2022- Medical Emergencies: 105 people attended

November 2022- Perio Class: 80 people attended

February 2023- OSHA Class: 65 people attended

March 2023- What's new in pediatric dentistry class: 85 people attended

Activities (eg membership recruitment, fundraising, community service):

I went to the College of Marin dental assisting graduation in June. Twenty students graduated and all have jobs. I also went to the Santa Rosa Junior College dental assisting program in May and talked to them about the CDAA and joining the ADAA. I will be going to the College of Marin and the Santa Rosa Junior College Dental Assisting Schools to sign up some students for the ADAA in April.

Other Information about your local (eg. changes in leadership, raffles, rosters)?

- Marin is IRS Complaint, New Officer Forms have been updated to the ADAA and the CDAA, our budget was sent into the CDAA and everything has been updated for the year 2023.
- We have a raffle at each CE dinner meeting and give away three \$10.00 gift cards.
- Here is a list of our local officers: Christy Burton- President / Director/Treasurer
I am in the process of training two new members to help out in the MCDAS so we can have more people in our local society help me.

Calendar of Future Events

- May 2023- Waterpik, Sue Schere will be coming from the East Coast to speak for the MCDAS on taking premedication.
- We also have two meetings in the Fall of 2023. Infection Control and a doctor from UCSF/ UOP dental school to speak on Sjogren's syndrome.

Communication (eg. invitations, requests . . .):

I have in the process of trying to recruit two or three new people to help out with the society and CE meetings.

Questions or Concerns about your local?

- I am needing some help in trying to find the best and cheapest way to have people pay with credit card for Ce meetings.
- Also, I need to sign up for mail chimp to get emails out to more people who attend the CE meetings.

Suggestions / Recommendations to CDAA BOT: None

Website, if any: www.mcdas.org

Membership data for March 2023

Total members: 33

PRO: 20 Life: 3 Student: 10 NPRO1:0 NPRO2: 0 NPRO3: 0

Membership data for April 2022

Total members: 44

PRO: 18 Life: 2 Student: NPRO1:22 NPRO2: NPRO3:

Orange County Dental Assistants Society (CA09)

Abby Teh RDA.CDA.OA
March 2023

Education Meetings:

Date: 9/17/2022

Attendance: Cancelled

Speaker Name / Topic: Michelle Callaghan - Bioclear hands on 4 CEU's

Location: PDS

Fee: Donation

Activities (eg membership recruitment, fundraising, community service):

Description: None to date

Other Information about your local: none to date

Calendar of Future Local Society Events:

Date: none to date

Description of Event: none

Communication sent by or to your local:

None to date

Questions or Concerns about your local?

None to date

Suggestions / Recommendations to CDAA BOD:

none

Website or social media, if any:

<https://orange-county-dental-assistants-society.constantcontactsites.com>

Membership data for March 2023

Total members: 47

PRO: 27 Life: 6 Student: 14 NPRO1: 0 NPRO2: 2 NPRO3: 0

Membership data for March 2022

Total members: 53

PRO: 28 Life: 4 Student: 19 NPRO1: 1 NPRO2: 1 NPRO3: 0

Pomona Valley Dental Assistants Society (CA10)

Claudia Pohl, Director
March 2023

Education Meetings: We again partnered with SFVDAS (thank you, Kristy!) using CDAA's Zoom (thank you, CDAA!) to provide 5 CE meetings with 10 CE. We have 'donated' \$80 to CDAA to offset the costs. All courses were \$5 members; \$10 non-members.

Date: Wednesday, June 14, 2023 7-9pm

Speaker Name / Topic: **Dr. Quinn Yu / *Treating Cranial Facial Development Non-Surgically***

Date: Wednesday, March 8, 2023 7-9pm

Speaker Name / Topic: **Dr. Stewart Balikov / *CA Dental Practice Act***
Attendance: 55 (25 non-members)

Date: Wednesday, January 11, 2023 7-9pm

Speaker Name / Topic: **Dr. Stewart Balikov / *CA Infection Control***
Attendance: 48 (21 non-members)

Date: Wednesday, October 12, 2022 7-9pm

Speaker Name / Topic: **Kristy Borquez / *Living with the Aftermath of Oral Cancer Treatment***
Attended: 33 (14 non-members)

Date: Wednesday, September 14, 2022 7-9pm

Speaker Name / Topic: **Drs. Jason Pair and Michael Hoang/ *Management of Pediatric Obstructive Sleep Apnea and Ankylosed Teeth***
Attended: 45 (19 non-members)

Activities (eg membership recruitment, fundraising, community service):

Elections were held electronically in September.

President: Claudia Pohl

Secretary: Jennifer Bierschbach

Education: Carol Gallegos

Communication (eg. invitations, requests . . .):

- A welcome email is sent to new members (every other month) via Constant Contact
- Changes in membership status are recognized via newsletters and website
- A newsletter was sent via Constant Contact in May, August, November, February
- The website is updated monthly
- We also communicate via our Facebook page

Questions or Concerns about your local? Growing the leadership

Website, if any: www.pvdas.org

Membership data for March 2023:

Total members: 126

PRO: 60 Life: 3 Student: 54 NPRO1: 4 NPRO2: 4 NPRO3: 1

Membership data for February 2022:

Total members: 146

PRO: 66 Life: 4 Student: 67 NPRO1: 3 NPRO2: 4 NPRO3: 2

San Diego County Dental Assistants Society (CA12)

Maryann Brawn, RDA

April 2023

Education Meetings: Meetings were held on Zoom

Date: Monday, April 3, 2023

Attendance: 16

Speaker Name / Topic: Shivali Gohel, DMD, MSD / Periodontics in Practice

Fee: \$10 members / \$15 non-member / \$5 students

Date: Monday, November 17, 2022

Attendance: 7

Speaker Name / Topic: Randall Stepp / CA Dental Practice Act

Fee: \$20 members / \$25 non-member / \$10 students

Date: Monday, October 24, 2022

Attendance: 9

Speaker Name / Topic: Malieka Johnson, DDS / Challenges, Progress, and Rewards in Providing Oral Health Care for Adults with Special Needs Conditions

Fee: \$20 members / \$25 non-member / \$10 students

Activities (eg membership recruitment, fundraising, community service):

Other Information about your local (eg. changes in leadership, raffles, rosters)?

We have changed our registration fees for our courses.

Calendar of Future Events: www.curasmiles.org

Communication (eg. invitations, requests . . .):

Questions or Concerns about your local?

Suggestions / Recommendations to CDAA BOT:

Website, if any:

Membership data for March 2023:

Total members: 22

PRO: 12 Life: 3 Student: 6 NPRO1: 1 NPRO2: 1 NPRO3: 0

Membership data for April 2022:

Total members: 25

PRO: 17 Life: 4 Student: 2 NPRO1: 2 NPRO2: 0 NPRO3: 0

San Fernando Valley Dental Assistants Society (CA13)

Kristy S. Borquez, CDA, RDAEF, FADAA
March 2023

Officers

President: Faye Holst, CDA, RDA **Secretary:** Myriam Gaytan, RDA
Vice-Pres: Linda Willyerd, RDA **Treasurer/Director:** Kristy S. Borquez, CDA, RDAEF

Education Meetings Currently Via Zoom & co-hosted with PVDAS

Fee: \$5 Members (ADAA, ADA, ADHA), \$10 Non-Members, Students Free
2 hours of CE provided per meeting

Date: Wednesday, September 14, 2022 7-9pm

Speaker/Topic: Dr. Jason Pair / *Orthodontics*

Date: Wednesday, October 12, 2022 7-9pm

Speaker/Topic: Kristy S. Borquez / *Living with the Aftermath of Oral Cancer Treatment*

Date: Wednesday, January 11, 2023 7-9pm

Speaker/Topic: Dr. Stewart Balikov/ *Infection Control*

Date: Wednesday, March 8, 2023 7-9pm

Speaker Name / Topic: Dr. Stewart Balikov/ *CA Dental Practice Act*

Activities

Attended 2022 CDAA Annual Session + Pre & Post Board Meetings 2022

Attended all CDAA Board meetings since last Annual Session

Attended ADAA Annual Session via Zoom October 22, 2022

Other Information about your local

* Nothing to report

Calendar of Future 2022 Events:

Co-hosting CE Zoom Meeting with PVDAS

Date: Wednesday, June 14, 2023 7-9pm

Speaker Name/Topic: DR. Quinn Yu/ *Treating Cranial Facial Growth Development without Surgeries*

Communication (eg. invitations, requests . . .):

* I have been in contact with: SFVDAS Officers and CDAA Board Members

Questions or Concerns about your local? None

Suggestions / Recommendations to CDAA BOT: None

Website, if any: Working on it

Membership data as of March 2023:

Total members: 36

PRO: 27 Life: 4 Student: 4

NPRO1: 0 NPRO2: 0 NPRO3: 0

Membership data as of March 2022:

Total members: 45

PRO: 30 Life: 8 Student: 7

NPRO1: 0 NPRO2: 0 NPRO3: 0

San Francisco Dental Assistants Society (CA18)

No Director

April 2023

Education Meetings:

Activities:

Calendar of Future Events:

Communication:

Questions or Concerns about your local?

Suggestions / Recommendations to CDAA BOT:

Website, if applicable:

Membership data for March 2023:

Total members: 7

PRO: 3 Life: 0 Student: 3 NPRO1: 0 NPRO2: 1 NPRO3: 0

Membership data for April 2022:

Total members: 14

PRO: 5 Life: 2 Student: 5 NPRO1: 1 NPRO2: 1 NPRO3: 0

San Gabriel Valley Dental Assistants Society (CA14)

No Director

April 2023

Education Meetings:

Activities:

Other Information about your local?

Calendar of Future Events:

Communication:

Questions or Concerns about your local?

Suggestions / Recommendations to CDAA BOT:

Website, if applicable:

Membership data for March 2023:

Total members: 37

PRO: 7 Life: 0 Student: 30 NPRO1: 0 NPRO2: 0 NPRO3: 0

Membership data for April 2022:

Total members: 51

PRO: 11 Life: 1 Student: 36 NPRO1: 3 NPRO2: 0 NPRO3: 0

Santa Clara County Dental Assistants Society (CA30)

Wendy Pio, CDA, RDA, BS

April 2023

Education Meetings: None Scheduled (But working on it!!)

Activities (e.g. membership recruitment, fundraising, community service):

Description: Toy Drive held for December involving members, non-members and SJCC students. Donations distributed by SJCC Police Services to local charitable organizations.

Description: Celebrated DARW with SJCC students by serving cake and promoting ADAA membership.

Other Information about your local (e. g. changes in leadership, raffles, rosters)
Eloise Reed (President, Treasurer, Secretary of SCCDAS) is no longer serving in any capacity on the SCCDAS board. I thank her for her years of leadership, support and friendship on the local, state and national level.

Calendar of Future Events:

Date: December 2023

Description of Event: Annual Toy Drive

Date: March 2024

Description of Event: DARW Celebration

Communication (e.g. invitations, requests specific to your local . . .):

Reached out to other BOD members and Ms. Reed to provide the required information for local/state documents.

Questions or Concerns about your local?

I need help determining the numbers for membership data!

Suggestions / Recommendations to CDAA BOD:

Website, if any:

Membership Data: March 2023

Total members: 39

PRO: 18 Life: 2 Student: 12 NPRO1: 2 NPRO2: 1 NPRO3: 4

Membership Data: April 2022

Total members: 54

PRO: 18 Life: 3 Student: 24 NPRO1: 5 NPRO2: 2 NPRO3: 2

Student Director

No Director

April 2023

Education Meetings:

Activities:

Other Information about your local?

Calendar of Future Events:

Communication:

Questions or Concerns about your local?

Suggestions / Recommendations to CDAA BOT:

Website, if any: <http://www.cdaaweb.org/students/>

Membership data for March 2023:

TOTAL: 267

Students: 228 NPRO1: 20 NPRO2: 11 NPRO3: 8

Membership data for April 2022:

TOTAL: 372

Students: 311 NPRO1: 37 NPRO2: 15 NPRO3: 9

COMMITTEE REPORTS

Annual Session

Claudia Pohl, Staff
March 2023

Directives: None at this time.

Activities (driven by the MOP):

- There are none listed in the MOP for the joint “Conference” CE events

Other Activities:

- Shari and I have been meeting regularly (monthly) via phone conference with Susan (CADAT), Melodi (CADAT President) and Zeña (CDAA President)
 - We began working on the meeting in the summer, beginning with choosing a venue with the help of Lisa Jarvis.
 - Lisa Jarvis provided us with a list of hotels in the San Diego area. After reviewing the options, we narrowed the selection to three: The Handlery Hotel, Wyndham San Diego Bayside and San Diego Marriott La Jolla. Susan and Claudia did a site visit of the three hotels; Lisa then went back to our top two to get the best deal possible. We chose the La Jolla property.
 - The hotel sleep rooms are more expensive. The food is more expensive. No surprise there, but we were hoping to keep the registration fee the same as it was for the 2020 Conference; we needed to raise it \$30 to assure a break-even. Included in the registration fee are breakfast and lunch. We are all a bit nervous since it's been 3 years with a live meeting and are not sure if attendance will be the same or not.
 - Shari developed the list of speakers. 13 CEUs will be provided over the two-day meeting and will include hands-on courses each day. Lecture topics include *Opening the Doors for Student Engagements, Hand-held X-ray Units, Ergonomics/Magnification, Perio/Implantology*. Hands-on courses include *Bioclear, Dental Materials, Hand-held x-ray, Magnification Systems and Matrix Systems*.
 - Registration opened early December and is on par with previous years.
 - Susan was again responsible for soliciting exhibitors for the event.
 - Zeña is handling door prizes again.
 - The team has proposed the date of April 19-20, 2024 for our next meeting, which will be in Northern California with Sacramento at the top of the list. Lisa Jarvis will begin working on sites soon.

Other Information about your committee: None at this time.

MOP: No changes at this time.

Strategic Plan

Areas affected: Education, Finances, Membership

Calendar of Future Events (specific to this position):

Questions or Concerns about your committee?

Suggestions / Recommendations to CDAA BOD: If we continue to meet jointly with CADAT, we may want to add a subcommittee of Annual Session for the Conference.

Budget and Finance

Kelly Thomas
April 2023

Directives (from previous meeting/s, if any): none

Activities (driven by the MOP):

- Approved invoices as presented and forwarded them to bookkeeper for disbursement.
- Distributed membership renewal report for the second and third quarters to the directors.
- Determined locals' membership dues owed and provided to bookkeeper for distribution.
- In conjunction with staff and committee, developed budget proposal

See Proposed Budget pp 82-86

Other Activities:

- Had training with outgoing B/F chair Shari Becker on membership fund disbursement to locals.
- Contacted Fresno/Madera DAS and San Diego DAS regarding updated IRS filing, officer form and CDAA local compliance forms.
- Emailed ADAA administration and ADAA president for status update for Q4 membership dues.
- Met with Bookkeeper and Staff to determine budget needs for 2023-2024

Other Information about your committee (needs, requests . . .): none

Communication sent to you or by you as Committee Chair:

answered questions about budget from executive board members as requested

MOP (Additions, changes, updates you think are needed?): none

Strategic Plan Activity:

I have worked on the section that applies to this committee and have attended the Strategic Plan meetings.

Calendar of Future Events for this Committee:

Date: TBD

Questions or Concerns about your committee? none

Suggestions / Recommendations to CDAA BOD: none

Account Balances (as of March 31, 2023):

Chase Checking Account	\$31,570.20
TD Ameritrade Account	\$72,429.97
Total	\$104,000.17

Investments

CDAAs Investments					March 31, 2023			YTD		
Amount Allocated	Company	Price Paid per Share	Number of Shares	Date Purchased	Amount Invested	Current Market Value	Dividends	Date Paid	Dividends - reinvested	Costs
\$5,000	Apple (AAPL)	\$136.00	36	2.8.2021	\$5,959.56	\$5,988.67	\$8.34	2.2023	\$33.29	\$0.00
\$5,000	Amazon (AMZN)	\$3,320.00	*20 (1 before)	2.8.2021	\$3,320.00	\$2,065.80	\$0.00	na	\$0.00	\$0.00
\$5,000	Beyond Me	\$130.00	40	3.24.2021	\$5,200.00	\$649.20	\$0.00	na	\$0.00	\$0.00
\$5,000	Costco (COST)	\$355.00	14	2.11.2021	\$4,970.00	\$7,026.74	\$12.71	2.2023	\$50.81	\$0.00
\$5,000	Microsoft (MSFT)	\$244.00	21	2.16.2021	\$5,124.00	\$6,140.21	\$14.44	3.2023	\$64.39	\$0.00
\$5,000	Netflix (NFLX)	\$553.00	9	2.8.2021	\$4,977.00	\$3,109.32	\$0.00	na	\$0.00	\$0.00
\$5,000	UnitedHealth (UNH)	\$325.00	15	2.8.2021	\$4,875.00	\$7,222.59	\$25.13	3.2023	\$50.03	\$0.00
\$5,000	Visa (V)	\$208.00	25	2.16.2021	\$5,200.00	\$5,700.98	\$11.36	3.2023	\$32.10	\$0.00
\$10,000	VBIA (VBIAX)	\$48.26	207.211	8.4.2021	\$10,000.00	\$9,105.14	\$77.63	3.2023	\$198.36	\$49.99
\$20,000	VWELX (VWELX)	\$6.00	3333.333	8.4.2021	\$20,000.00	\$18,827.12	\$86.23	3.2023	\$718.73	\$49.99
	Cash					\$6,391.35	\$1.90		\$0.00	\$0.00
\$70,000				Total Invested	\$71,063.56	\$72,227.12	\$237.74		\$1,147.71	\$99.98

ADAA Past-Due Rebates Status

Nov14	Dec14	Jan15	Feb15	Mar15	Apr15	May15	Jun15	Jul15	Aug15	Sep15	Oct15	Nov15	Dec15		
\$1,712	\$3,330	\$964	\$4,847.33	\$1,260	\$1,392	\$820	\$752	\$620	\$136	\$412	\$320	\$1,324	\$6,432	\$ 24,321.33	Total Owed to CDAAs
\$1,712 Paid Mar-17	\$3,330 Paid Jan-18	\$964 Paid Jan-18	\$4,867 Paid Jan '19	\$1,260 Paid Jan '20	\$0 Paid 2021 or 2022									\$ 12,113.33	Total Amount Repaid as of 3.2023
Current amount ADAA owes CDAAs as of 3.2023														\$ 12,208.00	

Bylaws/MOP Committee

Claudia Pohl

March 2023

Directives (from previous meeting/s):

1. Bylaws Chair to bring back a bylaws amendment to reflect protocol the board can change the bylaws.
2. Bylaws Chair to amend bylaws – move voting from general assembly to electronic voting.
3. Sent updated MoP to board following the August Board meeting

Activities (driven by the MOP):

- Reviewed Local Compliance spreadsheet and contact locals that have Rules of Governance that need to be updated: all locals are up-to-date EXCEPT SGVDAS
- Reviewed the proposed changes to the MoP submitted by Zena prior to action by the Board.
- Sent email (10/25/2022) to last known officers asking for a status update. As of December 6, I had heard from Adrienne (she says hi to all!) and Jennie. They agree it is time to dissolve the local. President Delling would like time to see if there is any interest in maintaining it. Their ROG (2007) show that CDAA would be the recipient of any funds. It was suggested that they go ahead and close the account and send the funds to CDAA since it is the first thing that needs to be done. They also have an old projector, amp, screen and perhaps a laptop. They are wondering if there is a local that would like them.

Other Activities:

- Based on discussion at the Board of Directors meeting, the committee (Kristy and I) developed amendments to address the directives. In the process, we included some other amendments that reflect the changes made by the ADAA to their bylaws.
- The amendments were sent to the Executive Committee for approval and then to the Board of Directors for approval.

See Proposed Amendment pp 64-77

Other Information about your committee (needs, requests . . .):

Communication (eg. invitations, requests specific to this position . . .):

None

MOP:

Strategic Plan:

Questions or Concerns about your committee?

Suggestions / Recommendations to CDAA BOD:

Corporate Development

Abbey Teh
April 2023

Directives: None

Activities (driven by the MOP):

Description:

1. Met with Hollie Garcia, Manager of Talent Acquisition, for TrueCare, TrueCare is a non-profit health center in Southern California. The meeting was productive, and we believe will lead to future collaboration with their volunteer activities as well as possible financial sponsorship. Hollie is to consult with their administration to see what may be possible for future financial sponsorship with CDAA and get back to us. She is also going to connect us with their community outreach manager so we may carry their volunteer events on our website. They work with a number of community services, including the boys and girls clubs, etc. They have a mobile dental clinic and provide services to schools and underserved areas. And of course, they are also looking to hire and prefer RDA's. Zena was able to provide valuable information regarding wages in the area as the issue of the dental assisting shortage also came into the conversation. We hope to have future collaboration with Hollie and TrueCare and offered to have her write an article for our next publication to inform the community of their services, volunteer and employment opportunities.
2. 11/4/22 @ 9:30Am – Zena and Shari met with Elmira (Ellie) Esmaeili, Bardia Hariri, Referral Mate- Discussed the possibility of their matching platform being utilized best w/CDAA and possibly beta testing at the Anaheim Presents. This is a social platform designed to connect like minded and like activity professionals together for additional and future networking. Shari had reached out to ADAA as a possible member benefit with this platform. However, ADAA did not respond. Scheduled a follow up meeting for 12/22/22.
3. 11/10/22- Shari and Zena met with Cheryl Collins-Kerr Total Care. Discussed having them be a sponsor for annual conference. Shari will pass Cheryl's information to Susan Dahn for sponsor table at conference. Kerr starting to offer CE for a fee vs free. Concerning charging the assistants too much for CE. Discuss possible rates that would keep the CE affordable. Scheduled a follow up meeting for 12/15/22.
4. 12/15/22- Shari and Zena met with Cheryl Collins- Kerr Total Care. Discussed possibly offering hands on IC courses to dental assistants and able to promote their products. Cheryl has calendared the dates for the conference in April. Susan Dahn to send sponsor information. Scheduled a follow up meeting for 1/12/23—this meeting was cancelled due to Cheryl being ill- will need to follow up for a future meeting.

Corporate Development Report cont'd

5. 12/22/22- Zena and Shari met with Bardia from ReferralMate. Discussed connecting Bardia with CDA for Anaheim meeting. CDAA will be reaching out to CDA to make an email introduction for possible beta test at the CDA Presents. ADAA had not responded to previous reach out. No follow up meeting scheduled at this time.
6. 02/7/22@ - Zena and Shari met with Adrian Collins with Batch. Platform being developed to match applicants with employment. This is a prescreening application to save time and money, eliminate resumes for the interviewing procedure. CDAA board to be used to assist in the final development and as a beta tester for the site/application. This platform to be offered free to applicants and charged to the employer. Adrian has dental experience in marketing and owns an ortho retail supply company as well. He is very pro-dental assistant and we see this relationship leading into other opportunities for his company and our organization. A follow up meeting is scheduled for March 31 at 9 am.

Other Activities:

Description:

CDA Presents Anaheim/ CDA Presents SF- Zena and Shari representing CDAA gathered additional corporate leads.

Shari followed up on additional leads from the CDAA website.

Other Information about your position: None currently

Communication:

Ongoing follow-up with past and current contacts for annual conference. Referrals given the annual conference sponsor coordinator Susan Dahn.

MOP: None currently

Strategic Plan:

3-3 Increase corporate sponsorship by 15%.

- Determine current levels.
- Evaluate resources for new corporate sponsors.
- Involve the Board of Directors for resources.

Calendar of Future Events

Date: March 31, 2023

Event: Follow up meeting with Adrian Collins from Batch.

Date: April 21-22, 2023

Event: CDAA CADAT Annual Conference

Questions or Concerns about this position: None.

Suggestions / Recommendations to CDAA BOD: Keep meeting potential sponsors and following up.

Education Committee

Linda Willyerd, RDA
April 2023

Directives (from previous meeting/s):

Activities (driven by the MOP):

Received and submitted requests from Diablo DAS, Marin County DAS, Orange County DAS, Pomona Valley DAS, San Diego County DAS, and San Fernando DAS.

Upcoming CE courses: March 24th, Diablo is having a live meeting presenting Infection Control and Dental Practice Act. March 29th, Marin County is having a live meeting presenting Updates in Pediatric Dentistry.
April 3rd, San Diego County is having a Zoom presentation on Periodontics in Practice.

We've added 9 webinar/home study courses this year to our website. Information is on our website cdaaweb.orgIt's been wonderful to provide both Live and Zoom presentations.

Other Activities:

Completed 2020-2022 Biennial Provider Number Renewal thru Breeze 8-25-2022. Next Renewal is due August 2024.

Shari Becker updated CDAA DPA course outline and submitted to the dental board, has been accepted and approved. Thank you Shari!

Other Information about your committee (needs, requests . . .):

Communication (eg. invitations, requests specific to this position . . .):

We received requests from attendees regarding copies of CE certificates they were unable to retrieve from the website.

Regarding Zoom meetings, there is a timeline of 7 days after each course to complete the evaluation and print the certificate.

Strategic Plan

Attended and worked on strategic plan with Wendy Pio and committee members.

Thank you to all our local societies and executive board for all their hard work this year!

Calendar of Future Events (specific to this position):

Questions or Concerns about your committee?

Suggestions / Recommendations to CDAA BOD:

Government Relations

Shari Becker, CDA, RDA, FADAA
April 2023 Annual Report

Directives: None

Activities:

As per the MOP:

- Served as spokesperson to represent the legislative interests of CDAA.
- Served as contact person with other individuals and organizations.
- Reviewed legislation affecting dental assisting and report to the CDAA Board.
- Provided a report for the Newsletters.
- Provided legislative representation at the following meetings:
 - August 25-26, 2022 DAC/DBC meeting-Sacramento
 - November 17-18, 2022, DAC/DBC meeting-Sacramento
 - February 9-10, 2023, DAC/DBC meeting-Sacramento
 - March 16, 2023 Sunset Review hearing for the CDHB. Meet and greets with 2 legislative aides.- Sacramento

The 2022-2023 year has been extremely busy with legislative activities.

The Alliance, which includes CDAA, CADAT and the RDAEF Association, was re-established in consideration of pending and future legislative activities.

CDAA held multiple workshops over the 2022 summer to review and discuss the scope of practice in preparation for future meetings with the Alliance and CDA regarding scope of practice.

AB 2276 sponsored by CDA and authored by Assemblywoman Wendy Carrillo was defeated last year with the influence of the Alliance, other stakeholders, CDHA and the Dental Hygiene Board of CA. Part of AB 2276's intention was to add coronal polish to the scope of practice for the unlicensed dental assistant. The defeat of that bill was striking.

Currently, AB481 sponsored by CDA and authored by Assemblywoman Wendy Carrillo is focused on a multitude of proposed changes to scope of practice for dental assisting as well as additional proposed pathways to licensure.

Existing pathways include:

Unlicensed DA's-OJT – 15 months or 1280 hours of work experience including required 8 hr. IC course DBC approved/2 hr. CDPA course DBC approved/ CPR (AHA/ARC).

Formal education- DBC approved or CODA accredited program- minimum of 800 hours of specific didactic and clinical education.

**AB 481 alternative qualifications and possible pathways:

Preceptorship - 300 hours of education related to dentistry from a verified CE provider/500 clinical-chairside hour. Once completion of the above verified, DA may enroll in and perform CP pre-licensure.

Program Endorsement- Completion of 85% (680 of 800 hours) of a board approved program be eligible to complete examination process prior to graduation upon approval from the program director. License would be held by the DBC until verification of completion of the program is received.

Alternative education- graduation from a dental assisting program (ROP/apprenticeship/adult education) to include 500 education hours and 300 verifiable clinical chairside hours.

DANB- intended for those who have moved from out of state. Includes graduation from a CODA program, is a CDA, would compete all CA mandatory education.

**Negotiations, conversations, and possible future amendments will be ongoing as this bill moves forward. You can track this bill as it moves ahead by going to

https://leginfo.legislature.ca.gov/faces/billNavClient.xhtml?bill_id=202320240AB481

Ongoing topics, concerns, and discussion at the DAC and DBC meetings include:

RDAEF current examination questions and validity.

RDAEF expansion of the scope of practice to consider again including local anesthesia and administration of nitrous oxide. A survey was conducted, a work group established and found that 56% of dentists agreed that considering the scope of practice of an RDAEF, administration of local anesthetic made sense for patient comfort and enhanced timing of procedures. Scope of practice would need to be initiated through the legislative process. Stay tuned.

The legislative package from 2018 included eliminating the requirement for analog x-rays with radiology courses allowing for the sole use of digital technology.

Final updating of the infection control language that was previously approved by the DAC and DBC.

Statistics from the DBC from 7/2022 – 12/2022: as reported 2/9/2023:

RDA approved applicants:	2442	RDA licenses issued:	1049	Pass rate:	72%
RDAEF approved applicants:	94	RDAEF licenses issued:	124	Pass rate	56%
OAP approved applicants:	181	OA permits issued:	142	Pass rate	71%
DSAP approved applicants:	10	DSA permits issued:	4	Pass rate	100%

Concerns and issues regarding possible obstacles of applicants approved versus licenses issued. Possible timing of approved application to actual testing effecting pass/fail rates. Validity of RDAEF exam questions of concern.

Other Activities:

CDAA has hired a lobbyist, Cody Boyles. Weekly Zoom meetings have been ongoing with the lobbyist. Additionally, weekly Alliance meetings on Zoom have taken place. These meetings will continue to be weekly or more frequently as needed.

I will be scheduling future meetings in Sacramento with legislators and their aides as this process continues.

Preparation needs to begin for the DBC Sunset Review.

Other Information about your position:

Please consider asking for financial donations from your local members to help in supporting our lobbyist. Also alerting them regarding the future need for their involvement as AB 481 and additional legislative and regulatory issues come forward.

Communication:

Ongoing communication continues with CDA regarding AB 481.

MOP: No additions at this time.

Strategic Plan:

Section 4.1 Pursue additional duties for all dental assisting categories.

Section 4.2 Monitor, respond to and pursue state legislative actions affecting dentistry.

Section 4.4 Monitor and interact with the DBC regarding matters affecting the profession of dentistry, dental hygiene and dental assisting.

Section 4.8 Develop and maintain relationship with other dental and/or health organizations.

Section 4.9 Advocate for and promote quality formal education for the dental assisting profession.

Calendar of Future Events:

Date: Weekly

Description of Event: Ongoing meetings with our lobbyist/ongoing meetings with the Alliance

Date: May 18-19, 2023

Event: DAC/DBC meeting southern CA

Questions or Concerns about this position: We need donations to help support our lobbyist fees. Any donations are appreciated. Also, we will be needing letter writing, email, in person visits to your local legislative representatives. The GR committee will assist with suggestions on coordinating meetings and also key talking points.

Suggestions / Recommendations to CDAA BOD:

I would like to schedule future GR forum meetings to orient, discuss and brainstorm areas involved with this committee and government relations in general. I also would like to have commitments from our locals to financially assist when able with the additional expenses being incurred with the lobbyist.

Though this year has been very busy, I appreciate the patience of this board as I continue to listen, learn and represent our organization. It has been an honor to serve.

Media

Claudia Pohl
March 2023

Activities (driven by the MOP):

Website Subcommittee *Also see Webmaster Report*

- Created a website monitoring schedule with board members who were on a rotating schedule for regular reviewing/updates needed on the website.

Journal Subcommittee. See Publications Report

Social Media Subcommittee

As per the MOP, the Social media subcommittee chair will be responsible for content of the following CDAA social media accounts: Instagram, Twitter, Facebook Page, Facebook Group.

If you have any of the following accounts please “like” or “follow” us on these accounts.

Facebook Page: California Dental Assistants Association

4/2016 – 139 page “likes”

10/2017 – 355 ‘likes’; 360 ‘follows’

11/2018 – 460 ‘likes’

7/2019 – 567 followers; 533 likes

10/2022 – 779 followers; 718 likes

Facebook Group: California Dental Assistants Association

4/2016 – 319 members

10/2017 – 451 members

11/2018 – 520 members

7/2019 – 564 members

10/2022 – 920 members

Instagram: @californiadentalassistants

4/2016 – 36 followers

10/2017 – 178 followers; 167 posts

11/2018 – 293 followers; 185 posts

7/2019 – ?? followers

10/2022 – 518 followers; 153 following; 190 posts

Twitter: CADentalassistants; @californiaDAs

4/2016 – 51 followers

10/2017 – 158 followers

11/2018 – 169 followers

7/2019 – ?? followers

10/2022 – 167 followers; 65 following. Last post: May 2019

Other Information about your committee (needs, requests . . .):

Communication (eg. invitations, requests specific to this position . . .):

Strategic Plan Areas affected (specific Goal and Objective number, eg 2-1):

Questions or Concerns about your committee? None at this time

Suggestions / Recommendations to CDAA BOT: None at this time

Membership

Christy Burton

April 2023

Directives (from previous meeting/s, if any):

Increase membership. At the CDA convention in San Francisco we had two sign up at the convention. We did get emails from RDA'S who wanted to come to a CE meeting and many were from San Jose area for the Santa Clara Society.

- Get the names/list from DNBYS to see who has their CDA license in California to try and reach out to have them sign up to become an ADAA member.
- Write an email to the ADAA asking if the CDAA can offer any assistance in the transition of the new company taking over the ADAA.
- Write an email asking the ADAA if they would give us permission at the Anaheim and San Jose CDA Conventions, as well as our annual CDAA/ CADAT conference to anyone wanting to sign up to be a new member with a \$25.00 discount if they signed up that weekend at any of the conferences.

Activities (driven by the MOP):

- Send each month a current ADAA roster to each director.
- I got the information from DANB and they are willing to send us the list which will include emails only of their members. I forwarded it on to Zena, and she told me to table it for a while.
- I have sent an email to the ADAA asking if we can have them ask their board to see if the CDAA gave the discounted membership price for the conventions. No one has emailed me back as of yet but I am thinking positive that they will give us the go ahead.
- Attend the strategic meetings to find out to get more people to sign up to become members.

Other Information about your committee (needs, requests . . .):

Ten new members have joined since February.

582 Members – April 2023.

Professional -276

Student- 228

Emeritus-4

Life Active-7

Life professional-24

NP1-22 NP2- 12, NP3- 7

Communication sent to you or by you as Committee Chair:

Zena asked me to help with the strategic committee.

MOP: No changes I am aware of that need to be added to the MOP.

Calendar of Future Events for this Committee:

Questions or Concerns about your committee? Nope

Suggestions / Recommendations to CDAA BOD: Nope

Strategic Plan Activity:

Goal 2.1 – Membership committee chair

Contact non-renewing members

Increase Pro membership by 5% each year.

CDAA Membership Data

Member Category	March 2023	Jan 2023	Oct 2022	Aug 2022	April 2022	Dec 2021	Dec 2020	Nov 2019	Dec 2018	Dec 2017	Dec 2016	Dec 2015
Pro-Annual	262	266	299	304	299	309	357	413	458	456	389	328
Life Active	6	7	5	5	6	0	10	14	103	111	129	128
Life Professional	22	24	27	28	26	36	34	37				
RO/Emeritus/Life 35	4	5	10	8	10	13	10	10				
NPRO3	7	7	9	8	9	10	12	19	10	2	13	9
NPRO2	11	12	12	13	15	17	21	15	20	28	7	22
NPRO1	20	22	33	40	37	36	28	43	33	36	51	23
Student	228	227	274	278	311	310	289	336	338	297	371	704
Total Members	560	570	669	684	713	731	761	887	962	930	960	1214
	CA00: 123	CA00: 122	CA00: 137	CA00: 185	CA00: 146	CA00: 158	CA00: 114	CA00:121		CA00:138		

CDAA Locals Membership Totals

	CA00	DDAS CA08	FMDAS CA04	MCDAS CA16	OCDAS CA09	PVDAS CA10	SDCDAS CA12	SFVDAS CA13	SFCDAS CA18	SGVDAS CA14	SCCDAS CA30	Students
Total Members Dec 2022	133	64	31	39	49	139	25	40	10	41	38	241
Total Members Dec 2021	162	78	47	45	54	153	26	44	13	54	55	310
Total Members Dec 2020	114	89	43	34	61	169	32	44	17	42	80	350
Total Members Nov 2019	121	104	46	43	58	205	48	54	20	63	69	336
Total Members Dec 2018	152	134	56	47	64	168	50	55	29	54	90	337
Total Members Dec 2017	137	130	77	63	66	168	48	64	25	56	50	296
Total Members Dec 2016	142	150	116	46	57	174	42	52	28	54	94	372
Total Members Dec 2015	334	165	206	35	56	200	28	43	30	89	x	697
Total Members Sept 2014	122	188	117	23	62	190	52	72	46	116	x	497

CDAA Locals Membership Data December 2022

Member Category	CA00	DDAS CA08	FMDAS CA04	MCDAS CA16	OCDAS CA09	PVDAS CA10	SDCDAS CA12	SFVDAS CA13	SFCDAS CA18	SGVDAS CA14	SCCDAS CA30	Students
Pro	58	32	7	23	29	61	13	28	5	9	18	x
LA/LO/LR/L35	4	5	4	4	5	4	4	8	2	1	3	x
NPRO3	3	0	0	0	0	1	0	0	0	0	4	8
NPRO2	1	0	0	0	1	3	1	0	1	0	2	10
NPRO1	8	7	0	0	0	3	1	0	0	0	5	24
Student	59	20	20	12	14	67	6	4	2	31	6	241
Total Members	133	64	31	39	49	139	25	40	10	41	38	283

Nominating

Kristina Gegamian
March / 2023

Directives

Activities:

1. I have attended all the CDAA Board meetings.
2. Contacted all board members to confirm if they will be serving for another year.
3. Received confirmation from:
 - Shari Becker - government relations
 - Jennifer Bierschbach - secretary
 - Christy Burton - 1st vice president
 - Jerry Delgado - student outreach
 - Zena Delling - president
 - Tricia Henry - publications
 - Wendy Pio - 2nd vice president
 - Claudia Paul - PV director, bylaws, MOP, management
 - Linda Willyerd – education
 - Kelly-Lennier Thomas – immediate past press
 - Abby Teh – corporate development

Other Information about your committee :

Communication sent to you or by you as Committee Chair:

All the board members were emailed the nomination forms.

Have received back the filled out forms from Zeña Delling, Abby Teh

Forwarded the nomination forms to Claudia Pohl and Zeña Delling.

President: Zeña Delling

1st Vice-President: Christy Burton

2nd Vice-President: Wendy Pio

Secretary: Abby Teh

See Candidate's Information pp 51-63

MOP

Strategic Plan Activity:

Calendar of Future Events for this Committee:

Questions or Concerns about your committee?

Suggestions / Recommendations to CDAA BOD:

Publications

Tricia Henry, Chair
Claudia Pohl, Staff
March 2023

Directives for the Publications Chair:

To compile, organize, edit and create eNewsletters and Journal publications as needed.

To compile content for publications as directed by the Board. Design, format and edit e-Newsletters and the CDAA Journal. Email publications to members.

Activities (driven by the MOP) of the Editor:

- Created and sent e-Newsletters for May, July, September, November, January and March
- Proofread the CDAA website as requested

Activities (driven by the MOP) of Staff:

- Sent *Conference Save the Date, AB2276, Scope of Practice, Conference Registration is Open, Happy Holidays, Happy DARW* and *Conference* emails.
- Uploaded the member list every other month for electronic distribution.
- Gathered information for publication as per the schedule established.
- Gathered statistical information for analysis and include in reports to the Board.
- Publication dates were established for the coming year for approval by the Board at the post-board meeting.

Proposed publication schedule for 2023-2024:

Date: September 15 Newsletter

Date: November 15 Newsletter

Date: January 15 Newsletter

Date: March 15 Journal (to meet the 30 days prior to General Assembly deadline)

Date: May 15 Newsletter

Other Information about your committee (needs, requests . . .):

From Tricia: Would love to share my knowledge with an interested CDAA member that would like to learn how to create publications and potentially take over my position.

Other Activities: None

MOP Additions, changes, updates? None at this time

Communication (e.g. invitations, requests specific to this position . . .):

Content is gathered by Staff and sent to Publications chair for the creation of various publications. Draft publication is sent to Staff & President for approval before publishing.

Strategic Plan Areas affected: Goal 1 and 2

Newsletter / Journal Distribution Statistics 2022 – 2023

Title	Send Date	Total Recipients	Unique Opens	Open Rate	Total Opens	Unique Clicks	Click Rate	Total Clicks
CDAAC March 2023 News	3/21/23 12:53	1447	635	44.25%	777	19	1.32%	39
CDAAC/CADAT Annual Conference 2023 Reminder!	3/13/23 19:14	1416	713	50.82%	1003	28	2.00%	56
Happy DARW 2023	3/5/23 11:13	1418	803	57.23%	1170	4	0.29%	8
CDAAC/CADAT Annual Conference 2023 is coming!	2/7/23 9:11	1424	668	47.31%	1132	28	1.98%	78
January 2023 e-News	1/25/23 19:13	1426	718	50.74%	1166	42	2.97%	75
Happy Holidays 2022!	12/19/22 7:44	1389	514	37.35%	690	2	0.15%	11
CDAAC/CADAT Annual Conference 2023	12/6/22 16:47	1394	700	50.61%	1061	27	1.95%	45
Save the Date: CDAAC/CADAT Annual Conference 2023	11/17/22 17:19	1541	753	49.28%	1213	22	1.44%	56
Nov 2022 eNews	11/15/22 13:29	1545	738	48.24%	1105	22	1.44%	32
Sept 2022 e-News	9/16/22 15:22	1511	820	54.67%	1368	21	1.40%	43
July CDAAC e-News	7/21/22 10:19	1415	650	46.26%	946	26	1.85%	40
Scope of Practice	6/27/22 6:43	1383	817	59.12%	1316	0	0.00%	0
CDAAC e-News May 2022	5/26/22 9:31	1385	742	53.69%	1088	39	2.82%	53
Conference Registration Deadline 2022 (copy 01)	4/18/22 20:45	1313	563	42.94%	805	10	0.76%	15
Oppose AB2276 #2	4/15/22 12:56	1315	630	48.05%	947	25	1.91%	44
Conference Registration Deadline 2022	4/3/22 10:30	1318	621	47.22%	924	35	2.66%	72
Oppose AB2276	3/31/22 17:17	1319	639	48.63%	1005	41	3.12%	128
Meeting re: AB2276	3/25/22 11:27	1320	622	47.34%	972	16	1.22%	57

As per MailChimp, 20% are engaged and often open our emails, 20% are moderately engaged and sometimes open our emails and 60% are not very engaged and rarely open our emails.

Industry average Open Rate is 40%. Industry average Click Rate is 6%
Open rate = how many emails were opened. Click rate = percentage of people who click on at least one image

Strategic Planning

Wendy Pio, CDA, RDA, BS
April 2023

Directives (from previous meeting/s): Worked with Pres. Delling and other members of Strategic Plan Committee including Claudia Pohl (Government Relations/Legislative) Shari Becker (Advisor) Linda Willyerd (Education Chair), Christy Burton (Membership Chair), Kelly Lennier Thomas (Budget & Finance Chair) and Abby Teh. Send the proposed Strategic Plan to members of the committee for review.

Activities (driven by the MOP):

Description: Work with committee chairs on revising the Strategic Plan.

Other Activities: ZOOM Meetings were held on the following dates: July 24,2022

August 24,2022

March 22, 2023

Other Information about your committee (needs, requests . . .): Heartfelt thanks to everyone on the Strategic Plan committee for all their input, ideas and overall support leading to the final plan. Special thanks to Claudia Pohl for putting everything together in electronic format for the committee.

See Strategic Plan pp 78-81

Communication:

Spoke with President Delling about Strategic Plan as well as the Budget and Finance Committee Chairperson (Shari Becker) regarding ideas for Strategic Plan.

MOP: (pg. 35)

- 1)Consider long range planning proposals and present such proposals to the BOD.
- 2)Research future goals and directions for the association and recommend policy changes to bring goals that are specified in the long-range plan.
- 3) Identify emerging problems and make recommendations.
- 4) Communicate throughout the year to review if goals are being met and re-evaluate progress of long-range proposals.

Strategic Plan: Committee shall be composed of five (5) members. Four shall be elected by the BOD serving a two (2) year term. Two (2) to be elected each year. The 2nd Vice-President shall serve as Chair of this committee. The Immediate Past President shall serve as an Advisor.

It is recommended that members of this committee include the Chairs of Education, Budget and Finance, Membership and Government Relations Committees.

Calendar of Future Events: Review Strategic Plan at future BOD meeting on 4/1/23

Suggestions / Recommendations to CDAA BOD:

Continue with collaborative meetings regarding the 2022-2024 Strategic Plan.

Meetings should include all committees that are contributing members of the Strategic Plan Committee.

Student Outreach

Vacant

March 2023

Directives (from previous meeting/s):

Activities (driven by the MOP):

Other Information about your committee (needs, requests . . .):

Communication (eg. invitations, requests specific to this position . . .):

MOP

Strategic Plan to fill all positions on the executive board for 2019-2020

Calendar of Future Events (specific to this position):

Questions or Concerns about your committee?

Suggestions / Recommendations to CDAA BOT:

STAFF REPORTS

Management / Support Staff

Claudia Pohl, CDA, RDA

March 2023

As per the MOP:

- Maintenance of Association documents
- Maintain PO Box and pick up mail regularly (every other week)
- File management (minutes, forms, MOP etc into dropbox and/or website)
- Developed Welcome New Member lists for Newsletters / Journal
- In consultation with the President, gathered information for publication for the Newsletters and Journal.
- Sent out and collected Confidentiality and Conflict of Interest for all board members
- Updated Board contact information and distributed
- Sent new Director, Chair and Officer information to webmaster for posting on website
- Updated and sent new Board Member Packets
- Sent the names/emails to webmaster of new officers/chairs for updating of web-based emails
- Uploaded membership lists to email distribution software (Mailchimp)
- Prepared for Board Meetings:
 - Set up Zoom meetings, sending Board notice for registration
 - Assembled and sent Board Packets
- Annual Meeting:
 - Balanced Annual Session Income & Expenses with CADAT
 - Compiled post-conference surveys
 - Compiled CE evaluations for speakers and distributed
 - Develop spreadsheet, speaker and exhibitor contracts and timeline
 - Process registrations

Other activities:

- Responded to/forwarded emails sent to CDAA via the website (info@cdaaweb.org)
- Balanced TD Ameritrade statements monthly and updated Investment sheet.
- Worked with bookkeeper to balance I&E sheet
- Sent list of non-compliant locals to treasurer and bookkeeper
- Updated state and locals membership tracking data
- Emails to ADAA re member list errors
- Provided google Ballot for SFVDAS elections
- Developed and sent budget worksheet to officers and chairpersons with budget
- Sent email to SGVDAS society re status
- Filed IRS form for San Gabriel Valley DAS (8/22)
- Set up Zoom meeting for OCDAS, PVDAS/SFVDAS and DDAS CE course
- Processed donations made to CDAA from local societies for use of electronic CE/zoom
- Processed PayPal registrations for PVDAS/SFVDAS and DDAS Ce Courses

- Created CE Evaluation Survey and CE Certificate for online/virtual use for PVDAS/SFVDAS, Diablo DAS and SDCDAS courses
- Edited videos for CE homestudy courses – Acupuncture, Medical Emergencies, Infection Control, DPA, Employee Rights, Soft Skills and Bloodborne Pathogens
- Developed/edited post-tests for CE homestudy courses – Acupuncture, Medical Emergencies, Infection Control, DPA, Employee Rights, Soft Skills and Bloodborne Pathogens
- Created and updated spreadsheet for completed homestudy courses completed to Education Chair
- Issued duplicate CE slips as requested.

Suggestions / Recommendations to CDAA BOT: None at this time.

Website Management / Webmaster

Claudia Pohl

March 2023

Activities:

As per the MOP:

- Finalized conference registration page
- Uploaded Conference documents and created landing page
- Uploaded Welcome New Members to website
- Uploaded membership lists to website (with Welcome email / Members-only info & password)
- Update website with recent newsletters and reports, volunteer opportunities, calendar info
- Updated Calendar with volunteer information
- Updated Calendar as requested by locals
- Updated web-based emails for 1st and 2nd VP
- Updated Calendar with Dental meeting dates

Other Activities:

- Weekly phone calls with JoAnne regarding new site. New website went live June 2022. Have been working out small glitches.
- There are nine homestudy courses available on the CDAA website:
- Provided FREE 1CE course to all members in September.
- Provided support for the virtual CE courses held by DDAS, OCDAS, SDCDAS San Diego and PVDAS/SFVDAS
- How-to documents have been created and are in the dropbox should the need arise.

Suggestions / Recommendations to CDAA BOT:

Bookkeeper

Mike Pohl

Annual Report 2023

As per the MOP:

- Served as signatory on all bank accounts
- Received and deposited 3 quarterly rebate checks (March through September)
- Sent rebate checks to locals as directed by Budget & Finance Chair
- Held rebates for those locals not in compliance which are San Gabriel Valley and San Francisco County. All held State Rebates will be returned to the CDAA General Fund if those locals are not in compliance within 60 days of the close of this fiscal year April 30, 2023.
- Paid approved bills
- Received and reconciled bank statements
- Prepared an annual Income & Expense Report for 2022-2023 May - March
- Prepared an Income & Expense Report for May – July
- Prepared an Income & Expense Report for July – October
- In conjunction with CDAA Staff arranged for the CDAA annual audit

Other activities:

- As directed by President Delling, I inputted all revised Budget categories into the CDAA annual Budget.
- Balances in the CDAA money accounts as of 3/31/23 are:
Chase Checking Account: \$31,570.20
TD Ameritrade Account: \$72,429.97
Net Worth: \$104,000.17

As a comparison, here are the balances in the CDAA accounts as of 3/31/22:

Chase Checking Account: \$21,885.20
TD Ameritrade Account: \$78,127.62
Net Worth: \$100,012.82

Recommendations:

- No recommendations at this time

Officer Candidate Information

**California Dental Assistants Association
Nomination Form for Officers**

Candidates for office may be nominated by any active, life, or special member of the CDAA, a local society, or a district trustee. The top portion of this form shall be complete and signed by the member or organization nominating the candidate. Sign as organization only if the organization has voted to nominate the candidate. The bottom portion of this page shall be completed and signed by the candidate.

Zena Delling is nominated as a candidate for **CDAA President** of the California Dental
(Nominee's Name) (Elective Office)

Assistants Association.

Signed: Zēna Delling
(Member name or if officer include organization and title)

27201 Vallevmont Road, Lake Forest, CA 92630 949-422-3311
(Address and telephone number)

.....

Zēna Delling (949) 422-3311
(Signature of nominee) (Home telephone number)
(Office telephone number)

27201 Vallevmont Road, Lake Forest, California, 92630 (949)422-3311

(Address) (City) (State) (Zip)
Orange County DAS January 29, 2023
(Local organization) (Date)

This form and all subsequent pages are to be typewritten and completed in their entirety. This nomination must be received by CDAA Nominating Chair no later than March 1st of the election year or it can be presented when nominated from the floor.

Please return to: **California Dental Assistants Association
Nominating Chair**

Incomplete forms and/or handwritten forms will not be accepted and will be returned to the nominee.

Nomination Form for CDAA Officers (Page 2)

EDUCATION (Post high school)

<i>SCHOOL</i>	<i>DATE OF GRADUATION</i>	<i>DEGREE OR CERTIFICATE</i>
San Diego Mesa College	August 31, 1985	Dental Assisting
Saddleback College	May 25, 2023	Certificate of Achievement Granted: 12/20/22 Field: General Education: CSU Associate in Arts Degree Granted: 12/20/22 Major: Liberal Studies Associate in Science - Transfer Degree Granted: 12/20/22 Major: Business Administration

Member of ADAA since 04/01/2009.

List credentials and how long held: Nomination Committee Chair 1 year served 2 terms; Annual Session Committee Chair 3 years served; 2nd Vice President served for 1 year; 1st VP 1 year; Currently serving as CDAA President 2022-2023 1 year:

List all dental related work experience in chronological order with dates.

<i>EMPLOYER (Name, City/State)</i>	<i>DUTIES</i>	<i>DATES</i>
J and Z Programs for Dentistry 27201 Vallemont Road Lake Forest, CA 92630	Compliance Program for Dental office; RDA Review Course; Back-office Efficiency Program for Dental offices; Adding courses	2018-Present
Rice Dentistry 15785 Laguna Canyon Road Irvine, CA 92618	Hired as a back-office consultant- later offered a Chairside RDA	Oct 2018-Oct 2020
Smile Café Dentistry, Huntington Beach, CA	Consultant-Back-office	Currently active
Academy of Dental Careers- School Closed 2718 Ortega Highway, Suite 207 San Juan Capistrano, CA 92675		Sept 2006- Nov 2007

I hereby state that the information contained hereon is true and, if elected to the above mentioned office, I shall accept the responsibilities of that office and shall serve to the best of my ability. I shall also uphold and support the policies of the American Dental Assistants Association and California Dental Assistants Association.

Zeña Delling
(Signature of Nominee)

January 29, 2023
Date

CDAA NOMINATION FORM FOR OFFICERS

Nomination Form for CDAA Officers (page 3)
Qualifications Of Candidate

Previous council/committee or officer experience (Local, State and National)

Position	Year	Organization
Nominating Committee Chair	2016	CDAA
Nominating Committee Chair	2018	CDAA
Annual Session Committee Chair	2018- Current	CDAA
2 nd Vice President-Executive Board	2019-2021	CDAA
1 st Vice President -Executive Board	2021-2022	CDAA
Orange County Dental Assistant Society President	2021-2022	OCDAS-Local Society
Orange County Dental Assistant Society Immediate Past President	2022-2023	OCDAS-Local Society
CDAA President	2022-2023	CDAA

CDAA NOMINATION FORM FOR OFFICERS - QUALIFICATIONS OF CANDIDATE

**California Dental Assistants Association
Nomination Form For Officers**

Candidates for office may be nominated by any active, life, or special member of the CDAA, a local society, or a district trustee. The top portion of this form shall be complete and signed by the member or organization nominating the candidate. Sign as organization only if the organization has voted to nominate the candidate. The bottom portion of this page shall be completed and signed by the candidate.

Christine Burton is nominated as a candidate for
(Nominee's Name)

First Vice President of the California Dental Assistants Association.
(Elective Office)

Signed: Christine Burton
(Member name or if officer include organization and title)

10 Beyer Ct, Novato Ca. 94945. 415 377-3074
(Address and telephone number)

.....
Christy Burton _____ (_415_) 377-3074
(Signature of nominee) (Home telephone number)

(_415). 457-5599 _____
(Office telephone number)

411 4th St. San Rafael, Ca, 94901 _____
(Address) (City) (State) (Zip)

Marin County 3/27/2022 _____
(Local organization) (Date)

This form and all subsequent pages are to be typewritten and completed in their entirety. This nomination must be received by CDAA Nominating Chair no less than 15 days prior to the election day or it can be presented when nominated from the floor.

Please return to: **California Dental Assistants Association
Nominating Chair**

Incomplete forms and/or handwritten forms will not be accepted and will be returned to the nominee.

CDAA NOMINATION FORM FOR OFFICERS

Nomination Form for CDAA Officers (Page 2)

EDUCATION (Post high school)

<i>SCHOOL</i>	<i>DATE OF GRADUATION</i>	<i>DEGREE OR CERTIFICATE</i>
San Marin High School	June 1994	Student
College of Marin – Dental Assisting Program College of Marin	June 1997 May 2013	Certificate of Program – Dental Assisting Associates of Science Degree
University of Southern New Hampshire	May 2022	Bachelors Degree

Member of ADAA since ____2014____ .

List credentials and how long held. _____
 RDA- 1997, CDA-2020, A.S. degree-2013, Bachelor's Degree 2022 _____

List all dental related work experience in chronological order with dates.

<i>EMPLOYER (Name, City/State)</i>	<i>DUTIES</i>	<i>DATES</i>
Dr. Edwin Deer, San Rafael, Ca	Front and back office	June 1997-june 1999
Petaluma Hillcrest Dental	Front and back office	July 1999-May 2003
Dr. Kim Kaufman	Front and back office	June 2004-current

I hereby state that the information contained hereon is true and, if elected to the above mentioned office, I shall accept the responsibilities of that office and shall serve to the best of my ability. I shall also uphold and support the policies of the American Dental Assistants Association and California Dental Assistants Association.

Christine Burton
 (Signature of Nominee)

03/21/2023
 Date

CDAA NOMINATION FORM FOR OFFICERS

Nomination Form for CDAA Officers (page 3)
Qualifications Of Candidate

Previous council/committee or officer experience (Local, State and National)

Position	Year	Organization
Nomination Committee	2016	CDAA
Marin County Dental Assistants Society President, Director, and Treasurer	2014- current	CDAA
Vice President	2018-2020, 2022	CDAA

CDAA NOMINATION FORM FOR OFFICERS - QUALIFICATIONS OF CANDIDATE

**California Dental Assistants Association
Nomination Form for Officers**

Candidates for office may be nominated by any active, life, or special member of the CDAA, a local society, or a district trustee. The top portion of this form shall be complete and signed by the member or organization nominating the candidate. Sign as organization only if the organization has voted to nominate the candidate. The bottom portion of this page shall be completed and signed by the candidate.

Wendy Pio is nominated as a candidate for
(Nominee's Name)

Second VP of the California Dental Assistants Association.
(Elective Office)

Signed Shari Becker
(Member name or if officer include organization and title)

5406 Lynbrook Place, Concord, CA 925 586-2081
(Address and telephone number)

.....

Wendy Pio (408) 338-9934
(Signature of nominee) (Home telephone number)

N/A
(Office telephone number)

1482 Triborough Lane San Jose California 95126
(Address) (City) (State) (Zip)

Santa Clara County Dental Assistants Society April 1st, 2023
(Local organization) (Date)

This form and all subsequent pages are to be typewritten and completed in their entirety. This nomination must be received by CDAA Nominating Chair no less than 15 days prior to the election day or it can be presented when nominated from the floor.

Please return to: **California Dental Assistants Association
Nominating Chair**

Incomplete forms and/or handwritten forms will not be accepted and will be returned to the nominee.

CDAA NOMINATION FORM FOR OFFICERS

Nomination Form for CDAA Officers (Page 2)

EDUCATION (Post high school)

<i>SCHOOL</i>	<i>DATE OF GRADUATION</i>	<i>DEGREE OR CERTIFICATE</i>
San Jose City College	June 1973	Associate of Science Degree (in Dental Assisting)
University of Phoenix	June 2016	Bachelor of Science in Business Administration

Member of ADAA since 2017.

List credentials and how long held. RDA (1990) CDA (2016)

List all dental related work experience in chronological order with dates.

<i>EMPLOYER (Name, City/State)</i>	<i>DUTIES</i>	<i>DATES</i>
Dr. Wayne Meyer San Jose, CA 95123	Chairside Dental Assistant	June 1973 – June 1978
Dr. Melvin Glick San Jose, CA 95123	RDA (Chairside & DA Coordinator)	June 1978 – June 1983
Dr. Michael Hoffman/Dr. Christopher Joy Palo Alto, CA 94301	RDA (Chairside & Safety/OSHA Coord.	Sept. 1983 – June 2005
Foothill Community College Los Altos, CA	Adjunct Instructor Dental Assisting Prog.	July 1998 – June 2005
San Jose City College San Jose, CA 95128	Fulltime/Tenured Instructor – Dental Assisting Program	January 2005 - Present

I hereby state that the information contained hereon is true and, if elected to the above-mentioned office, I shall accept the responsibilities of that office and shall serve to the best of my ability. I shall also uphold and support the policies of the American Dental Assistants Association and California Dental Assistants Association.

Wendy Pio, CDA, RDA, BS
(Signature of Nominee)

April 1, 2023
Date

CDAA NOMINATION FORM FOR OFFICERS

Nomination Form for CDAA Officers (page 3)
Qualifications Of Candidate

Previous council/committee or officer experience (Local, State and National)

Position	Year	Organization
CDAA Nominating Chair	2020	CDAA
Director (SCCDAS)	2019 - Present	CDAA
Second Vice President	2020 - Present	CDAA

CDAA NOMINATION FORM FOR OFFICERS - QUALIFICATIONS OF CANDIDATE

**California Dental Assistants Association
Nomination Form For Officers**

Candidates for office may be nominated by any active, life, or special member of the CDAA, a local society, or a district trustee. The top portion of this form shall be complete and signed by the member or organization nominating the candidate. Sign as organization only if the organization has voted to nominate the candidate. The bottom portion of this page shall be completed and signed by the candidate.

Manolita Abby Teh is nominated as a candidate for
(Nominee's Name)

Secretary of the California Dental Assistants Association.
(Elective Office)

Signed [Signature]
(Member name or if officer include organization and title)

220 S. Tola Place Anaheim CA. 92804 (714) 851-4079
(Address and telephone number)

[Signature] (714) 851-4079
(Signature of nominee) (Home telephone number)
() M/A
(Office telephone number)

220 S. Tola Place Anaheim CA. 92804
(Address) (City) (State) (Zip)
OCDAS 3-6-2023
(Local organization) (Date)

This form and all subsequent pages are to be typewritten and completed in their entirety. This nomination must be received by CDAA Nominating Chair no less than 15 days prior to the election day or it can be presented when nominated from the floor.

Please return to: **California Dental Assistants Association
Nominating Chair**

Incomplete forms and/or handwritten forms will not be accepted and will be returned to the nominee.

CDAA NOMINATION FORM FOR OFFICERS

Nomination Form for CDAA Officers (Page 2)

EDUCATION (Post high school)

SCHOOL	DATE OF GRADUATION	DEGREE OR CERTIFICATE
DONIC Manila Philippines	10/1989	DM1
Cal State LB	9/2013	Teaching Credential

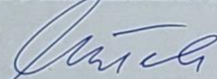
Member of ADAA since _____.

List credentials and how long held. RDA (1996), CDA (2014) OA,
CTE (2013)

List all dental related work experience in chronological order with dates.

EMPLOYER (Name, City/State)	DUTIES	DATES
ABC Adult School / School District 20122 Cabrillo Lane Cerritos 90709	Program Director Instruction	Current
Dawney Adult School 12340 Woodruff Ave. Dawney 90240	Instructor	6-1-2016 12-2020
Fullerton Dental Assistant 92835 2720 N. Harbor Blvd. Fullerton	Director/Instructor	9-2012 7-2020
North Orange County ROP 385 N. Muller St. Anaheim 92804	Instructor	2-2015 6-2016
Everest College 511 N. Brookhurst St #300 Anaheim 92801	Instructor	9-2009 1-2015

I hereby state that the information contained hereon is true and, if elected to the above mentioned office, I shall accept the responsibilities of that office and shall serve to the best of my ability. I shall also uphold and support the policies of the American Dental Assistants Association and California Dental Assistants Association.



 (Signature of Nominee)

3-6-2023

 Date

CDAA NOMINATION FORM FOR OFFICERS

Nomination Form for CDAA Officers (page 3)

Qualifications Of Candidate

Previous council/committee or officer experience (Local, State and National)

[illegible]

CDAA NOMINATION FORM FOR OFFICERS - QUALIFICATIONS OF CANDIDATE

CALIFORNIA DENTAL ASSISTANTS ASSOCIATION
BYLAWS

Revised May 2005
Amended April 2016
Amended April 2018
Amended April 2019

CALIFORNIA DENTAL ASSISTANTS ASSOCIATION

BYLAWS

ARTICLE I – NAME

The name of this organization shall be the California Dental Assistants Association, hereinafter referred to as “the Association” or “this Association”.

ARTICLE II – OBJECTIVES

To advance the careers of dental assistants and to advocate for the dental assisting profession in matters of education, professional activities, credentialing and legislation. To promote the ideals and growth of the Association which aid in the accessibility and delivery of quality oral health care to the public.

ARTICLE III - ORGANIZATION STRUCTURE

Section 1. Affiliation. This Association shall be a state association of the American Dental Assistants Association.

Section 2. Local Organization.

A. Organization. Local organizations may be organized in a town, city, county or district for the purpose of furthering the objectives of this Association.

B. Name. A Local Organization may be named for a town, city, county or district; However, no two (2) Local Organizations shall adopt the same name.

C. Affiliation. Affiliation shall be granted upon the following conditions:
(1) Approval by this Association and
(2) Approval by the American Dental Assistants Association.

D. Governance. Local Organizations shall be governed by Bylaws or Rules of Governance.

E. Individuals applying for membership in a local component organization shall be required to maintain membership in the ADAA and this State Association.

Section 2. Study Clubs. The State Association, at its discretion, may provide for its members to organize into local member study clubs. Guidelines for the establishment and support of such local member study clubs shall be determined by the State Association.

Section 3. Incorporation. This Association is a non-profit corporation organized under the laws of the State of California. Certificate of Incorporation duly signed and acknowledged has been filed in the office of Secretary of State on the first day of March, Nineteen Hundred Sixty-Three (1963).

ARTICLE IV – MEMBERSHIP

Section 1. Admission. Membership shall include those individuals who will support and promote the objectives of this Association, regardless of diversity.

Section 2. Active Membership Categories. There shall be the following active membership categories: Professional Membership, Student Membership, Life Membership.

A. Professional Membership. Professional membership may be granted to any dental assistant which includes, but is not limited to, the Clinical Dental Assistant, Administrative Dental Assistant, and Dental Assistant Educator, or any individual with a history of experience working in a dental assistant capacity, who will support and promote the objectives of this Association.

1. A professional member shall have the privilege of voting, holding elective office and serving as chairman or member of a council or committee.

2. Professional members shall pay annual national and state dues as determined by the adopted budget of the Association and the (State Association).

B. Student Membership. Student membership may be granted to any student enrolled in a dental assisting program, or to a graduate of a dental assisting program enrolled full-time in either a program related to dentistry or in a college degree program, who will support and promote the objectives of this Association. A student member shall have the privilege of serving as a member of a council or committee. Student members shall pay annual dues as determined by the adopted budget of the Association.

C. Honorary. Honorary membership may be conferred upon an individual who has contributed substantially to the welfare of the dental assisting profession. To be elected an honorary member, the individual shall be approved through unanimous vote of members of the Board of Directors and a two-thirds (2/3) vote of the General Assembly. No dues shall be required.

D. Life Membership. Life membership shall be granted to a professional member who has maintained continuous professional membership, or who has maintained continuous professional membership interrupted by student membership, for a period of thirty-five (35) years and who will support and promote the objectives of this Association. All life members shall have all of the privileges and benefits of

professional membership and shall pay National dues at a twenty-five percent (25%) reduction.

Proviso 1: This does not affect the members who have achieved life membership before October 23, 1979, and pay no dues or members who have achieved life membership before October 8, 1988, and pay fifty percent (50%) of professional member dues, and members who have achieved special member status and pay fifty percent (50%) of professional member dues or life retired status prior to May 13, 2017, and pay no dues.

1. All Life Members who pay no dues shall be required to update their membership information annually via the ADAA membership renewal process in order to maintain their life member benefits and remain on the life member roster.

Proviso 2: Members who have previously achieved the status "Active Life Member" after 25 years of continuous membership prior to May 13, 2017, may continue to display their life member pin and certificate and use the designation "ADAA Life Member." These members shall remain listed in the professional member category on the official roster and pay full dues until they achieve life- member status with thirty- five (35) continuous years of membership. This Proviso shall be removed from the ADAA bylaws on May 13, 2027.

Section 3. Local Membership: A person applying for membership in a local organization shall be required to maintain membership in this Association and the American Dental Assistants Association.

Section 4. State Membership: Where no local organization exists, a person applying for membership in this Association shall be classified as an independent state member. Such members shall be required to maintain membership in this Association and the American Dental Assistants Association.

Article V - Dues

ADAA, state and local dues shall be paid by each member directly to the Central Office of the ADAA in accordance with the procedures and dates established by the ADAA and this Association. No dues shall be refunded to any member whose membership terminates for any reason. (Provisions shall be made for distribution of dues amounts received from ADAA Central Office for each membership category.)

Section 1. State Dues. State dues shall be determined by the General Assembly at the Annual Session of this Association. No dues shall be refunded.

Section 2. Assessment. In case of need, the voting body at the General Assembly of this Association may, by a 2/3 vote, levy any assessment on each professional member in the amount to be determined by this Association's General Assembly.

ARTICLE VI – GENERAL ASSEMBLY

Section 1. Composition and Qualifications. The General Assembly shall be composed of Professional, Life members of this Association and the voting members of the Board of Directors. Only professional and life members shall have the right to vote.

Section 2. Registration.

- A. All members wishing to participate in the General Assembly must register prior to the meeting. The deadline dates for registration shall be determined by the Executive Committee.

Section 3. Quorum.

One-third (1/3) of the members registered for the Annual Session, representing one-third (1/3) of the Local Organizations, shall constitute a quorum for the transaction of business at any meeting of the members. A quorum established at the beginning of the meeting shall constitute a quorum throughout.

Section 4. Meetings.

- A. The General Assembly shall meet regularly at the Association's Annual Session.
- B. A special meeting of the General Assembly may be called by a two-third (2/3) vote of the voting members of the Board of Directors. Thirty (30) days notice shall be given. The member apportionment of the previous Annual Session shall prevail.

Section 5. Duties. The General Assembly shall be the governing body of this Association. It shall determine policies of the Association and determine dues for all membership classifications. It shall ~~adopt an Annual Budget~~, elect officers, ~~amend the Bylaws~~ and transacts whatever Association business is necessary.

Rationale: *As requested by the Board of Directors, this will move authority for the Bylaws from the general membership to the Board of Directors.*

ARTICLE VII – OFFICERS

Section 1. Number and Titles. The elected officers shall be four (4) in number: President, First Vice-President, Second Vice-President and Secretary.

Section 2. Eligibility. Only professional, life or special members shall be eligible to serve as an officer.

- A. To be eligible to serve as President, First Vice-President, Second Vice-President or Secretary shall have served as a voting member of the Board of Directors for one (1) year.

Section 3. Nominations. In accordance with the CDAA Manual of Procedures, the Nominating Committee shall develop and present a slate of one (1) or more qualified candidates for each office to be filled. The report of the committee shall be published in the Annual Session notice and presented to the General Assembly at the Annual Session. Additional nominations may be made from the floor of the General Assembly. No name may be placed in nomination without the written consent of the nominee.

Section 4. Elections. Election ~~shall~~ **may** be by **electronic** ballot **in the established year.** **Each CDAA member in good standing is eligible to cast one vote.** ~~during the Annual Session, and a majority vote of the General Assembly shall elect.~~ **The winning candidate will be selected by the majority of votes cast by the membership. In the event of a tie, a runoff election would occur between the tied candidates until one candidate receives a majority vote.** ~~If there is only one candidate for each office, the full slate of candidates may be elected by voice vote. All ballots shall be destroyed at the close of Annual Session.~~ **Any record of voting shall be destroyed at the end of the election process.**
Rationale: As requested by the Board of Directors, this will provide for electronic voting for the election process.

Section 5. Term of Office. The term of office for all officers shall be one (1) year or until a successor is duly elected. No elected officer shall serve more that two (2) consecutive terms in the same office. The officers shall assume their duties upon adjournment of the Annual Session.

Section 6. Duties. Officers shall perform the duties as may be prescribed by these Bylaws, the CDAA Manual of Procedures and the parliamentary authority adopted by the Association.

Section 7. Vacancies. In the event the office of President shall become vacant, the First Vice-President shall fill the vacancy until the next Board of Directors meeting when the Board will elect a President for the remainder of the term and fill whichever vacancy remains. At the next Annual Session, the office of President shall be filled in the same manner as that provided for in the nomination and election of officers. Vacancies in the offices of First Vice-President, Second Vice-President, and Secretary shall be filled by election by the Board of Directors.

Section 8. Removal for Cause. The Board of Directors, by a two-thirds (2/3) vote of all its voting members, may remove any officer/committee chair from office for just cause.

ARTICLE VIII – BOARD OF DIRECTORS

Section 1. Composition. The Board of Directors shall be composed of four elected officers, Immediate Past-President, one Director or Alternate from each Local Organization and Committee Chair: Annual Session, Budget and Finance, Bylaws/Manual of Procedures, Corporate Development, Education, Government Relations, Publications, Membership, Nominating, Strategic Planning, Student Outreach

and Media. **The Executive Director shall be an ex-officio member of the Executive Committee without vote.**

Rationale: *This provides clarity for the role of and expectations for the Executive Director.*

Section 2. Duties. The Board of Directors shall be the governing body of this Association ~~when the General Assembly is not in session~~, subject to the policies established by the General Assembly, Articles of Incorporation, these Bylaws and the parliamentary authority adopted by this Association.

Section 3. Quorum. **A majority** ~~At least a one third (1/3)~~ of the voting members of the Board of Directors shall constitute a quorum at any meeting. If urgent business requires a vote when the Board of Directors is not in session, a mail ballot authorized by the President or by Four (4) voting members may be taken. **A majority of** ~~At least a one third (1/3)~~ members of the Board of Directors shall be required on any mail ballot. The Board of Directors at its next meeting shall confirm such action.

Section 4. Meetings. There may be four (4) regular Board of Directors meetings scheduled by the Executive Committee. The scheduled meetings shall be authorized to submit to the Board of Directors for approval.

Special meetings of the Board of Directors may be called at any time by the President or upon written request of four (4) voting members of the Board. Notice shall be given fifteen (15) days prior to the meeting. The purpose of the meeting shall be stated and no other business shall be transacted.

Section 5. Vacancies for Directors are filled by the Local Organization. Vacancies for elected committee chairmen are filled by election by the Board of Directors. Vacancies for appointed Committee Chairs are filled by the President.

ARTICLE IX – EXECUTIVE COMMITTEE

Section 1. Composition. The Executive Committee shall be composed of the four (4) elected officers and the Immediate Past President. **The Executive Director shall be an ex-officio member of the Executive Committee without a vote.**

Rationale: *This provides clarity for the role of and expectations for the Executive Director.*

Section 2. Duties. The Executive Committee shall execute business between meetings of the Board of Directors required for the proper administration of the affairs of the Association. All actions shall be reported to the Board of Directors for approval.

Section 3. Quorum. A majority of the voting members of the Executive Committee shall constitute a quorum at any meeting. If urgent business requires a vote when the Executive Committee is not in session, a mail ballot-authorized by the President or by three (3) voting members may be taken. A majority vote of the Executive Board shall be

required on any mail ballot. Actions shall be confirmed by the Board of Directors at the next meeting.

Section 4. Meetings. Regular meetings of the Executive Committee may be held four (4) times in a year. Special meetings of the Executive Committee may be called at any time by the President or upon written request of three (3) voting members of the committee. Notice shall be given ten (10) days prior to the meeting.

ARTICLE X - COMMITTEES

Section 1. Standing Committees. There shall be the following Standing Committees appointed by the President or selected as prescribed in these Bylaws:

ELECTED Chair: Government Relations, Membership, Nominating and Strategic Planning.

APPOINTED Chair: Annual Session, Budget & Finance, Bylaws/Manual of Procedures, Corporate Development, Education, Publications, Student Outreach and Media.

Section 2. Duties. Committees shall perform the duties as may be prescribed in these Bylaws, the Manual of Procedures and the parliamentary authority adopted by this Association.

Section 3. Composition and Term of Office.

- A. Annual Session. This committee shall be composed of a minimum of three (3) members and a maximum of five (5) members to serve for a term of one (1) year with one member to serve as Chair.
- B. Budget and Finance. This committee shall be composed of the Immediate-Past President as Chair, Chairs of Annual Session and Corporate Development, First Vice-President and one (1) member at large.
- C. Bylaws/Manual of Procedures. This committee shall be composed of at least three (3) members with one member to serve as Chair. One (1) of the committee members shall be First Vice-President and one (1) who has served on a previous Bylaws/Manual of Procedures Committee to serve for a term of one (1) year.
- D. Corporate Development. This committee shall be composed of at least three (3) members, including the Budget & Finance and Media Chair and will serve a term of one (1) year with one member to serve as Chair
- D. Education. This committee shall be composed of at least three (3) members, with one (1) member to serve as chair. The chair shall serve a term of two (2) years to coincide with the renewal date of the C.E. Registered Provider Renewal Certificate. The two (2) committee members shall serve a term of one (1) year.

- E. Government Relations. This committee shall be composed of at least three (3) members to serve for a term of two (2) years. The Board of Directors shall elect the Government Relations Committee by ballot. From this elected committee the chair is then elected, by ballot, by the committee. Two (2) committee members shall be elected in the even year and one (1) shall be elected in the odd year.
- F. Publications. This committee shall be composed of at least three members with one member to serve as Chair. The Chair of this committee shall serve a two (2) year term with the other members serving a one (1) year term.
- G. Membership. This committee shall be composed of at least three (3) members, one from the South and one (1) from the North to serve for a term of one (1) year. The First Vice-President shall serve as Chair of this committee.
- H. Nominating. This committee shall be composed of at least three (3) members, nominated from the floor, elected by ballot at the Annual Session to serve for a term of one (1) year. One (1) member shall have served on the Board of Directors for at least one (1) year within the past three (3) years. The Chair of this committee shall be elected by ballot by this committee.
- I. Strategic Planning. This committee shall be composed of five (5) members. Four (4) shall be elected by the Board of Directors serving a two (2) year term, Two (2) to be elected each year. The 2nd Vice-President shall serve as Chair of this committee. The Immediate Past President shall serve as Advisor.
- J. Student Outreach. This committee shall be composed of at least three (3) members to serve a term of one (1) year with one member to serve as Chair.
- K. Media. This committee shall be composed of at least three (3) members to serve a term of two (2) years with one member to serve as Chair.

Section 4. Other Committees. The Board of Directors may create such other special committees, subcommittees or task forces as shall be deemed necessary and which shall not be in conflict with other provisions of these Bylaws. The duties of any such bodies shall be prescribed by the Board of Directors upon their creation.

ARTICLE XI – CONTRACTUAL ~~PERSONS / PERSONNEL~~ / EMPLOYEES

The Board of Directors may utilize any appropriate means to conduct the business of the association, including but not limited to employing staff whose conditions of employment shall be specified by the Board Directors and/or using independent contractors whose contract shall be specified by the Board of Directors.

ARTICLE XI – ANNUAL SESSION

The Annual Session shall be held at a time and place determined by the Board of Directors of CDAA. The notice of the Annual Session shall be sent to all members thirty-(30) days prior to the meeting.

ARTICLE XII – OFFICIAL PUBLICATION

Section 1. Title. The title of the official publication shall be the CDAA Journal.

Section 2. Objective. The objective shall be to publish scientific and educational articles, activities and information concerning this Association.

ARTICLE XIII – LOCAL ORGANIZATIONS

Section 1. Objectives. The Local Organizations objectives shall be: to share in responsibility for quality dental health care delivery to all; to advance the practice of dental assisting toward the highest standards of performance obtainable by supporting and encouraging formal education and in providing quality continuing education; credentialing for the dental assisting profession and to communicate effectively with all members of health-related professions.

Section 2. Directors. Each Director shall be elected by the Local Organization to serve as representative on the Board of Directors to serve for a term of two (2) years. Upon the Directors absence an alternate may be designated to vote at this Association's Board of Directors Meetings.

ARTICLE XIV – ADAA REPRESENTATION, DELEGATES AND ALTERNATES

~~Section 1. Trustee. The Trustee shall be one (1) in number and shall be a legal resident of the Twelfth District. The Trustee shall serve for a term of three (3) years and have the support of this Association. The Trustee may attend the Board of Directors meetings and General Assembly without the right to vote. The District Trustee shall act as advisor and liaison person. Trustees shall perform the duties as may be prescribed in ADAA and CDAA Bylaws, ADAA and CDAA Manual of procedures and the parliamentary authority adopted by this Association. Election shall be by ballot during the ADAA Annual Session General Assembly, and a majority vote of the Trustee's District shall elect.~~

Section 1. ADAA Directors. Any ADAA Professional, Life, and Federal Services member in good standing may serve as a Director on the ADAA Board of Directors. Director nominees shall be submitted to the ADAA Office in accordance with ADAA procedures. The term of office shall be three (3) years. Voting will be held in a general election in accordance with ADAA Bylaws and procedures. Directors shall be voting members of the

ADAA Board of Directors and shall perform the duties as adopted by the ADAA governing and procedural documents.

~~Section 2. This Association shall send Delegates and Alternates to the ADAA Annual Session and shall be entitled to one Delegate plus one Delegate for every fifty (50) Voting members and equal number of Alternates.~~

Section 2. All members in good standing of this Association are entitled to attend the annual ADAA membership meeting and have the opportunity to voice opinions to the ADAA Board of Directors regarding issues relevant to the Association.

~~Section 3. The record date for determining the number and apportionment of delegates shall be determined by the ADAA Board of Trustees.~~

~~Section 4. Delegates and Alternates shall be elected at the Board of Directors meeting held prior to the ADAA deadline date. All nominees shall submit a letter of intent to attend the ADAA Annual Session. The Local Organization will nominate their Delegates and Alternates from the letters of intent received.~~

~~Section 5. All Delegates and Alternates shall be professional, life or special members in good standing.~~

Rationale: *This reflects changes made to the ADAA Bylaws.*

ARTICLE XV – FINANCE

Section 1. Fiscal year. The fiscal year of this Association shall be from May 1 to April 30.

Section 2. Funds.

- A. The general fund shall consist of all monies received other than those specifically allocated to other funds or trusts. This fund shall be used to defray all expenses incurred by this Association not otherwise provided for in these Bylaws. The general fund may be divided into Operation and Reserve divisions at the direction of the Board of Directors. No funds shall be withdrawn from the Reserve fund without prior approval of the Board of Directors. All checks shall be signed by one of the following signatory persons: President, Budget & Finance Chair, Secretary or Contractual Employee.
- B. Special Funds. There shall be a scholarship fund and such other funds that are deemed necessary by the Board of Directors.

Section 3. Budget. With recommendations of the Budget and Finance Committee and the Executive Committee, the General Assembly at the Annual Session shall adopt an Board

of Directors shall have the authority to adopt an annual operating budget covering all activities of the Association for the next **each** fiscal year.

Rationale: *This moves the authority for the budget from the general membership to the Board of Directors and is in line with ADAA Bylaws.*

Section 4. Audit: The Board of Directors shall have all accounts of the Association audited not less than annually **by an independent auditing and/or accounting firm**. Within sixty (60) days following the end of each fiscal period **Upon completion of the audit**, a financial report for the year just completed shall be made available to the membership.

Rationale: *This provides clarity and is in line with ADAA Bylaws.*

Section 5. Bonding. Trust or surety bonds for officers and employees of the Association shall be secured by the Executive Board, and the cost shall be paid by the Association.

Section 5. Tax Identification Number. The Tax Identification number for this Association is 952258329.

ARTICLE XVI – DISSOLUTION

Section 1: ~~Per the bylaws of the American Dental Assistants Association (ADAA), this Association shall only be dissolved at the recommendation of the State District Trustee and upon 2/3 (two-thirds) vote by ballot of the ADAA Board of Trustees. Dissolution shall only occur when:~~

- a. ~~The State Association remains without ADAA recognized state officers for a period of seven (7) years; or~~
- b. ~~There are no members within the state.~~

a. The Association shall distribute any remaining funds to one (1) or more 501(c)(3) or 501(c)(6) organizations providing activities or services that benefit the dental assisting profession or dental patients.

Rationale: *This provides clarity and is in line with ADAA Bylaws and process.*

Section 2: This Association shall use its funds only to accomplish the objectives and purposes specified in these Bylaws, and no part of said funds shall inure, or be distributed, to the members of this Association.

If at any time this Association shall be dissolved, any funds remaining shall be distributed to one (1) or more regularly organized and qualified charitable education, scientific or philanthropic organizations to be selected by the Executive Board. The Executive Committee's selection is: **equal distribution between the Juliette A. Southard Scholarship Fund and the Juliette A. Southard Relief Fund**

ARTICLE XVII – Parliamentary authority

“Robert’s Rules of Order Newly Revised”, (current edition) shall be the parliamentary authority for this Association and shall be applicable in all cases where it does not conflict with these Bylaws, the Manual of Procedures and the Standing Rules of this Association.

The Parliamentarian may attend the Executive Committee, Board of Directors and General Assembly meetings without the right to vote.

ARTICLE XVIII – AMENDMENTS

Section 1. These Bylaws may be amended at a General Meeting of the Organization as follows:

- A. By a two-third (2/3) vote provided that the proposed amendments, after recommendation by the Executive Board, have been presented in writing at least thirty (30) days prior to voting and that all amendments have been reviewed and approved by the ADAA Bylaws/Manual of Procedures Committee before presentation to the membership.
- B. By unanimous vote, provided approval of the amendment has been obtained from the appropriate member of the ADAA Bylaws/Manual of Procedures Committee, and that previous notice of the amendment has been given at an earlier meeting.

Section 2. A revision of these Bylaws may be ordered on the recommendation of the Executive Board and a majority vote of the House of Delegates/General Assembly. When a revision of the Bylaws is brought before the general membership for a vote, only a majority vote is necessary to adopt an amendment to the proposed revision. A two-thirds (2/3) vote is necessary to adopt the proposed revision, provided approval of the revised Bylaws has been obtained from the ADAA Bylaws/Manual of Procedures Committee before presentation to the membership.

Section 1. These Bylaws may be amended by the Board of Directors by a two-thirds (2/3) vote.

Section 1. Prior to adopting any amendment that changes the voting rights of members, fixes a quorum for meetings, changes procedures for removing officers or directors, procedures for filling vacancies for officer and director positions, or changes the number of officers and directors or their classifications, qualifications, or terms of office the following must be met:

1. The amendment must have been reviewed by the appropriate subcommittees for any possible conflicts in governance and policy

2. Board of Directors must schedule a membership forum and solicit opinions about the amendment(s) from constituents prior to voting.
 - a. 30-day notice of the proposed amendments and the forum must be given to all members.

Section 3. No amendment shall be made to these bylaws that would cause the Association to cease to qualify as an exempt corporation under Section 501 (c)(6) of the Internal Revenue Code.

Rationale: *As requested by the Board of Directors, this will move authority to change the bylaws from the general membership to the Board of Directors.*

CDAА STRATEGIC PLAN

2022-2025

GOAL #1: EDUCATION

Provide and promote quality continuing education for all members of the dental assisting team.

OBJECTIVES / STRATEGIES:

- 1-1 Provide regional education meeting/s each year**
 - Identify best time of year to provide
 - Decide on type of course (in-person or virtual)
 - Give priority to CA00 members and inactive locals members
 - Assess areas populated with CA00 and inactive locals members
 - Market the event
- 1-2 Provide continuing education courses that address the needs of the general, specialty, business assistant and students.**
 - Review content provided to assure broad scope of courses
- 1-3 Develop and provide online continuing education courses (homestudy)**
 - Review online courses for currency
 - Develop at least 1-2 new courses each year
- 1-4 Develop and maintain relationship/s with other dental and/or health organizations.**
 - Identify other organizations
- 1-5 Provide student-centered education**
 - Identify courses of interest to students
 - RDA Review?
 - Interviewing

GOAL #2: MEMBERSHIP

Assure strong membership base that reflects the dental assisting community.

OBJECTIVES / STRATEGIES:

2-1 Increase total professional membership by 5% each year

- Gather data for assessment
- Contact non-renewing active members
 - Electronic survey
 - Mail
 - Phone
- Testimonials from renewing members to post on website
- Grass roots effort

2-2 Increase conversion of student members to continued membership to 15%

- Gather data for assessment
- Assess student membership for targeted communication and/or courses based on highly populated student areas
- Conduct a needs assessment of current student/NPRO1/2/3 for what they need from us?
- Send emails to NPRO1, 2 and 3
- Gather testimonials from NPRO1, 2 and 3
- Contact lapsed NPRO1, 2 and 3 to gather information about what they want

2-3 Promote student membership

- Local societies to visit RDA Programs
- Create video for use at RDA Programs
- Contact instructors/directors of dental assisting program to establish liaisons with dental assisting students

2-4 Implement targeted membership recruitment programs

- Create membership video highlighting students/instructors (ADAA Pres/other states' teachers? Stephanie M – student member/SADAA,Teacher) for use at Annual Conference to reach teachers
- Send letter to DANB certificants in CA
- Gather testimonials from employing dentists as to value of membership
- DARW promotion

2-5 Provide for student events annually

- Assess student membership for targeted communication and/or courses based on highly populated student areas

2-6 Develop and maintain relationship/s with other dental and/or health organizations.

- Attend high school career days

GOAL #3: FINANCE

Assure a sound financial structure that ensures sustainability.

OBJECTIVES / STRATEGIES:

3-1 Maintain at least 100% of annual operating expenses in reserve.

- Determine current operating expenses
- Determine what percent we currently have in reserve

3-2 Increase non-dues revenue by 15%.

- Determine current non-dues revenue
- Review current non-dues revenue stream
- Explore opportunities for new non-dues revenue streams

3-3 Increase corporate sponsorship by 15%.

- Determine current levels
- Evaluate resources for new corporate sponsors
- Involve the Board of Directors for resources

3-4 Provide scholarship/s annually as funds permit

- Determine financial resources available
- Develop criteria and related forms and procedures
- Develop application deadline

GOAL #4: LEGISLATIVE

Advance the profession of dental assisting through legislative activity.

OBJECTIVES / STRATEGIES:

- 4-1 Pursue additional duties for all dental assisting categories.**
 - Review the scope of practice at least two years prior to Sunset Review
- 4-2 Monitor, respond to and pursue state legislative actions affecting dentistry.**
 - Receive emails from Dental Board of CA
 - Review DAC and DBC Board materials
 - Attend DAC and DBC meetings, reporting back to CDAA BoD
- 4-3 Monitor national legislative actions affecting dentistry.**
- 4-4 Monitor and interact with the Dental Board of California regarding matters affecting the profession of dentistry, dental hygiene and dental assisting.**
 - Review DAC and DBC Board materials
 - Attend DAC and DBC meetings, reporting back to CDAA BoD
- 4-5 Make recommendations as needed for appointments to California legislative and regulatory agencies, bureaus and boards affecting dental assisting (eg DBC, DAC).**
 - Keep apprised of DAC position end of terms
 - Seek and recruit candidates for open positions on the DAC
 - Request a letter of recommendation from CDAA for candidates as appropriate
- 4-6 Increase participation of CDAA members at Dental Board and Dental Assisting Council meetings**
 - Provide information about DAC and DBC meetings to members
 - Develop a 'visit your legislator' program
- 4-7 Interact with, monitor and/or attend Dental Hygiene Board of CA (DHBC) meetings.**
 - Receive emails from DHBC
 - Review DHBC Board materials
 - Attend DHBC meetings when able
- 4-8 Develop and maintain relationship/s with other dental and/or health organizations.**
 - Identify other organizations
 - ?
- 4-9 Advocate for and promote quality formal education for the dental assisting profession.**
 - Review the Dental Assisting Program regulations and statutes at least two years prior to Sunset Review
 - Engage with California Association of Dental Assisting Teachers (CADAT) regarding potential changes to Program regulations and statutes
 - Review CODA standards and align with Dental Assisting Program regulations and statutes when possible

3.31.23	Budget Category	Budget Line Item	2019-2020 Actual	2020-2021 Actual	2021-2022 Actual	2022-2023 Approved Budget	2023-2024 Proposed Budget	Notes / Comments 23-24 Proposed Budget
INCOME:								
	Dues Rebates from ADAA: March - February							
		Active Members						
		CA00 (75 members @ \$40)	\$3,040.00	\$2,640.00	\$2,960.00	\$3,760.00	\$3,000.00	Dec 22=74
		Local Chapters (300 members @ \$40)	\$17,160.00	\$15,760.00	\$9,720.00	\$13,080.00	\$12,000.00	Dec 22=297
		Student Members (250 members @ \$4)	\$1,220.00	\$1,060.00	\$1,188.00	\$1,240.00	\$1,000.00	Dec 22=241
		Returned Rebates	\$0.00	\$890.00	\$200.00	\$0.00	\$0.00	
		Total Dues Rebates from ADAA	\$21,420.00	\$20,350.00	\$14,068.00	\$18,080.00	\$16,000.00	
	ADAA Past Dues							
			\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	Still owed \$12,208. no payment received 20-21
	Annual Session							
		Corporate Support/Sponsorship	\$900.00	\$3,000.00	\$1,225.00	\$11,000.00	\$12,000.00	
		Registration	\$5.00	\$12,000.00	\$18,175.00	\$27,000.00	\$28,000.00	
		Other	\$0.00	\$250.00	\$406.62	\$0.00	\$0.00	
		Total Annual Conference	\$905.00	\$15,250.00	\$19,806.62	\$38,000.00	\$40,000.00	
	Education							
		Online / Homestudy courses (not live)	\$0.00	\$0.00	\$0.00	\$0.00	\$500.00	
		Live courses (in-person or virtual)	\$3,528.19	\$670.00	\$0.00	\$200.00	\$200.00	
		Total Education	\$3,528.19	\$670.00	\$0.00	\$200.00	\$700.00	
	Interest Income							
			\$1,158.83	\$416.14	\$2.50	\$0.00	\$0.00	Dividends are being rolled over back into the account
	Donations							
		Legislative Donations	\$100.00	\$0.00	\$0.00	\$0.00	\$2,000.00	
		Scholarship	\$600.00	\$150.00	\$200.00	\$600.00	\$600.00	
		Miscellaneous	\$50.00	\$200.00	\$375.00	\$100.00	\$100.00	
		Total Donations	\$750.00	\$350.00	\$575.00	\$700.00	\$2,700.00	
	Corporate Support/Sponsorship							
		Website Advertising/Sponsor	\$0.00	\$0.00	\$0.00	\$1,000.00	\$1,000.00	
		Event Sponsorship	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
		Total Corporate Sponsor	\$0.00	\$0.00	\$0.00	\$1,000.00	\$1,000.00	
	Transfer from Savings							
			\$2,000.00	\$0.00	\$0.00	\$0.00	\$14,500.00	This is to cover the costs for the lobbyist
		TOTAL INCOME	\$29,762.02	\$37,036.14	\$34,452.12	\$57,980.00	\$74,900.00	

3.31.23	Budget		2019-2020	2020-2021	2021-2022	2022-2023	2023-2024	Notes / Comments 23-24 Proposed Budget
	Category	Budget Line Item	Actual	Actual	Actual	Approved Budget	Proposed Budget	
EXPENSES:								
	ADAA Visit to CDAA (Trustee / President)							
		Lodging - Trustee	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	With the new ADAA Bylaws, we no longer have a Trustee
		Meals	\$0.00	\$0.00	\$0.00	\$100.00	\$100.00	For ADAA President visit
		Travel - Trustee	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	With the new ADAA Bylaws, we no longer have a Trustee
		Registration - Trustee	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	With the new ADAA Bylaws, we no longer have a Trustee
		Registration - President	\$0.00	\$0.00	\$0.00	\$299.00	\$299.00	For ADAA President visit
		Total ADAA Visit to CDAA	\$0.00	\$0.00	\$0.00	\$399.00	\$399.00	
	Annual Conference							Budgeting for an in-person meeting
		Audio-Visual	\$0.00	\$0.00	\$0.00	\$4,000.00	\$4,000.00	
		Food & Beverage	\$0.00	\$0.00	\$0.00	\$18,000.00	\$25,000.00	
		Meeting Room / Internet Fees	\$1,000.00	\$0.00	\$0.00	\$0.00	\$0.00	
		Support Staff	\$0.00	\$1,939.96	\$2,310.00	\$500.00	\$500.00	
		Printing (schedule etc for folder, CE forms . .)	\$0.00	\$0.00	\$0.00	\$350.00	\$350.00	
		Reimbursement to CADAT	-\$472.40	\$4,608.56	\$7,246.29	\$6,100.00	\$3,500.00	
		Site visit / early arrival for preparation	\$285.36	\$0.00	\$0.00	\$300.00	\$300.00	
		Speaker honoraria / Comps (registration/rooms)	\$0.00	\$3,750.00	\$2,375.00	\$2,000.00	\$2,000.00	
		Credit Card Processing Fees	\$395.26	\$342.92	\$629.04	\$950.00	\$950.00	
		Supplies (folders, labels, printing, goody bag supplies)	\$169.17	\$0.00	\$0.00	\$200.00	\$200.00	
		Total Annual Conference	\$1,377.39	\$10,641.44	\$12,560.33	\$32,400.00	\$36,800.00	
	Association Business Expenses							
		Accounting Audit /Tax Preparation	\$1,000.00	\$1,000.00	\$1,000.00	\$1,000.00	\$1,000.00	
		Bookkeeping Supplies	\$314.24	\$150.78	\$205.30	\$180.00	\$180.00	
		Liability Insurance - General Liability	\$869.00	\$869.50	\$974.38	\$875.00	\$900.00	
		Liability Insurance - Officer and Director	\$1,016.00	\$1,057.00	\$1,102.00	\$1,000.00	\$1,200.00	
		PO Box Rental	\$122.00	\$134.00	\$318.00	\$164.00	\$164.00	
		Postage	\$0.00	\$0.00	\$29.29	\$25.00	\$25.00	
		Virtual Meeting Platform (Zoom)	\$0.00	\$149.90	\$114.99	\$149.00	\$149.00	
		Credit Card Processing Fees	\$9.79	\$6.10	\$6.27	\$25.00	\$25.00	
		Stationary/Business Cards	\$0.00	\$0.00	\$0.00	\$200.00	\$200.00	
		Taxes (Secretary of State filing)	\$0.00	\$15.08	\$10.35	\$20.00	\$20.00	
		Total Association Business Expenses	\$3,331.03	\$3,382.36	\$3,760.58	\$3,638.00	\$3,863.00	

3.31.23	Budget		2019-2020	2020-2021	2021-2022	2022-2023	2023-2024	Notes / Comments 23-24 Proposed Budget
	Category	Budget Line Item	Actual	Actual	Actual	Approved Budget	Proposed Budget	
EXPENSES:								
Board Meetings								
	Summer Board Meeting							
		Lodging (18 sleep nights @ \$158)	\$3,075.36	\$0.00	\$0.00	\$0.00	\$0.00	
		Meal/s	\$263.14	\$0.00	\$0.00	\$0.00	\$0.00	
		Meeting Room Fees/AV	\$50.00	\$0.00	\$0.00	\$0.00	\$0.00	
		Student Director Travel	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
		Total Summer Board	\$3,388.50	\$0.00	\$0.00	\$0.00	\$0.00	
	Winter Board Meeting							
		Lodging (18 sleep nights @ \$158)	\$2,168.28	\$0.00	\$0.00	\$0.00	\$0.00	
		Meal/s	\$467.10	\$0.00	\$0.00	\$0.00	\$0.00	
		Meeting Room Fees/AV	\$454.12	\$0.00	\$0.00	\$0.00	\$0.00	
		Student Director Travel	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
		Total Winter Board	\$3,089.50	\$0.00	\$0.00	\$0.00	\$0.00	
	Pre-Board / Annual Meeting							
		Lodging (18 sleep nights @ \$158)	\$0.00	\$0.00	\$0.00	\$3,000.00	\$3,000.00	
		Meal/s	\$0.00	\$0.00	\$0.00	\$500.00	\$500.00	
		Meeting Room Fees/AV	\$0.00	\$0.00	\$0.00	\$400.00	\$400.00	
		Student Director Travel	\$0.00	\$0.00	\$0.00	\$200.00	\$200.00	
		Total Pre- / Post- Board	\$0.00	\$0.00	\$0.00	\$4,100.00	\$4,100.00	
Contract Employees								
		Bookkeeper @\$15/hr up to 5 hr/ month.	\$900.00	\$900.00	\$900.00	\$900.00	\$900.00	
		Office Management @\$15/hr up to 10 hr/ month.	\$2,348.00	\$1,890.00	\$1,447.50	\$1,900.00	\$1,900.00	
		Website Management @\$15/hr up to 5 hr/ month.	\$487.50	\$547.50	\$1,080.00	\$800.00	\$800.00	
		Social Media @\$15/hr up to 3 hr/ month.	\$0.00	\$0.00	\$1,040.00	\$540.00	\$540.00	
		Website Contracted Support (JoAnne O)	\$280.00	\$120.00	\$0.00	\$500.00	\$500.00	
		Website Project	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
		Total Contract Employees	\$4,015.50	\$3,457.50	\$4,467.50	\$4,640.00	\$4,640.00	
Dues Rebates								
		04 Fresno-Madera	\$170.00	\$150.00	\$170.00	\$200.00	\$110.00	Dec 22= 11
		08 Diablo	\$600.00	\$600.00	\$410.00	\$500.00	\$440.00	Dec 22= 44
		09 Orange County	\$460.00	\$60.00	\$250.00	\$350.00	\$350.00	Dec 22= 35
		10 Pomona Valley	\$1,030.00	\$920.00	\$520.00	\$850.00	\$720.00	Dec 22= 72
		12 San Diego County	\$400.00	\$310.00	\$130.00	\$220.00	\$190.00	Dec 22= 19
		13 San Fernando Valley	\$410.00	\$380.00	\$260.00	\$390.00	\$360.00	Dec 22= 36
		14 San Gabriel Valley	\$180.00	\$0.00	\$0.00	\$160.00	\$100.00	Dec 22= 10
		16 Marin County	\$250.00	\$280.00	\$190.00	\$230.00	\$270.00	Dec 22= 27
		18 San Francisco County	\$100.00	\$30.00	\$0.00	\$80.00	\$80.00	Dec 22= 8
		30 Santa Clara County	\$330.00	\$320.00	\$290.00	\$290.00	\$320.00	Dec 22= 32
		Total Dues Rebates to Locals	\$4,290.00	\$3,050.00	\$2,220.00	\$3,270.00	\$2,940.00	

3.31.23	Budget Category	Budget Line Item	2019-2020 Actual	2020-2021 Actual	2021-2022 Actual	2022-2023 Approved Budget	2023-2024 Proposed Budget	Notes / Comments 23-24 Proposed Budget
EXPENSES:								
	Education (Continuing)							
		CE Provider Permit (\$325 in even year)	\$0.00	\$338.65	\$0.00	\$400.00	\$0.00	
	Online / Homestudy courses (not live)							
		Course Development (honoraria . . .)	\$0.00	\$160.00	\$0.00	\$0.00	\$0.00	
		Credit Card Processing Fees	\$0.00	\$8.15	\$0.00	\$50.00	\$50.00	
		Website Support @\$15/hr up to 3 hr/ month.	\$0.00	\$87.00	\$0.00	\$540.00	\$540.00	
	Live courses (in-person or virtual)							
		Meeting Room / Speaker Fees	\$250.00	\$0.00	\$0.00	\$0.00	\$0.00	
		Credit Card Processing Fees	\$94.21	\$8.78	\$0.00	\$100.00	\$100.00	
		Supplies	\$2,142.35	\$0.00	\$0.00	\$0.00	\$0.00	
		Travel Expenses	\$537.02	\$0.00	\$0.00	\$0.00	\$0.00	
		Total Education Expenses	\$3,023.58	\$602.58	\$0.00	\$1,090.00	\$690.00	No CE renewal this year
	Executive Officer Expenses							
		President Travel	\$800.30	\$0.00	\$0.00	\$550.00	\$550.00	
		ADAA Meeting	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
		President Travel - BOD Meetings	\$0.00	\$0.00	\$0.00	\$300.00	\$300.00	
		First VP Travel - BOD Meetings	\$150.00	\$0.00	\$0.00	\$300.00	\$300.00	
		Second VP Travel - BOD Meetings	\$250.00	\$0.00	\$0.00	\$300.00	\$300.00	
		Secretary Travel - BOD Meetings	\$250.96	\$0.00	\$0.00	\$300.00	\$300.00	
		Immediate Past President Travel - BOD Meetings	\$0.00	\$0.00	\$0.00	\$300.00	\$300.00	
		Total Officer Expenses	\$1,451.26	\$0.00	\$0.00	\$2,050.00	\$2,050.00	
	General Assembly							
		Awards, Pins, Plaques	\$0.00	\$125.00	\$0.00	\$150.00	\$150.00	Includes new Teacher/Student Award
		Incoming President Plaque & Gavel	\$0.00	\$0.00	\$0.00	\$100.00	\$100.00	
		Membership Promotion/Marketing	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
		Printing	\$0.00	\$0.00	\$0.00	\$35.00	\$35.00	
		Total General Assembly	\$0.00	\$125.00	\$0.00	\$285.00	\$285.00	
	Gifts							
		12th District Trustee	\$100.85	\$105.95	\$105.95	\$0.00	\$0.00	With the new ADAA Bylaws, we no longer have a Trustee
		ADAA Foundation	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
		Other Benevolence Gifts	\$92.63	\$132.84	\$84.29	\$200.00	\$200.00	
		President	\$125.44	\$105.95	\$109.90	\$100.00	\$100.00	
		Total Gifts	\$318.92	\$344.74	\$300.14	\$300.00	\$300.00	

3.31.23	Budget Category	Budget Line Item	2019-2020 Actual	2020-2021 Actual	2021-2022 Actual	2022-2023 Approved Budget	2023-2024 Proposed Budget	Notes / Comments 23-24 Proposed Budget
EXPENSES:								
	Government Relations							
		Hotel	\$707.86	\$0.00	\$0.00	\$500.00	\$500.00	DBC having in person meetings again
		Meals	\$297.39	\$0.00	\$352.96	\$300.00	\$300.00	
		Travel (air, mileage)	\$1,304.78	\$0.00	\$0.00	\$1,000.00	\$1,000.00	DBC having in person meetings again
		Lobbyist	\$0.00	\$0.00	\$3,333.34	\$0.00	\$13,000.00	
		Total Government Relations	\$2,310.03	\$0.00	\$3,686.30	\$1,800.00	\$14,800.00	
	Membership							
	CDA Anaheim							
		Hotel	\$394.88	\$0.00	\$0.00	\$500.00	\$500.00	
		Meals	\$27.59	\$0.00	\$0.00	\$50.00	\$50.00	
		Travel (air, mileage)	\$281.39	\$0.00	\$0.00	\$50.00	\$50.00	
		Booth Rental	\$0.00	\$0.00		\$500.00	\$500.00	
	CDA San Jose							
		Hotel	\$0.00	\$0.00	\$0.00	\$500.00	\$500.00	
		Meals	\$0.00	\$0.00	\$0.00	\$50.00	\$50.00	
		Travel (air, mileage)	\$0.00	\$0.00	\$0.00	\$200.00	\$200.00	
		Booth Rental	\$0.00	\$0.00	\$257.97	\$500.00	\$500.00	
	Membership / Marketing Materials		\$337.40	\$0.00	\$589.39	\$300.00	\$350.00	
		Total Membership	\$1,041.26	\$0.00	\$847.36	\$2,650.00	\$2,700.00	
	Publications							
		MailChimp Service	\$0.00	\$0.00	\$0.00	\$50.00	\$50.00	
		Printing	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
		Total Publications	\$0.00	\$0.00	\$0.00	\$50.00	\$50.00	
	Student Outreach							
		Recruitment and Involvement (event, supplies, travel	\$111.97	\$0.00	\$0.00	\$0.00	\$0.00	
		Scholarship/s	\$0.00	\$0.00	\$0.00	\$405.00	\$405.00	Student #1 of Student Mentor/Development Scholarship
		Total Student Outreach	\$111.97	\$0.00	\$0.00	\$405.00	\$405.00	
	Website							
		Domain Fee (\$62 eoy @ GoDaddy)	\$62.32	\$0.00	\$21.17	\$65.00	\$65.00	Next Domain renewal due 4/2022.
		Website Hosting (WPENGINE)	\$0.00	\$240.00	\$683.16	\$300.00	\$300.00	plugin costs??
		Website Emails/Backup/Security (BlueHost)	\$680.92	\$321.40	\$321.76	\$400.00	\$400.00	
		Total Website	\$743.24	\$561.40	\$1,026.09	\$765.00	\$765.00	
	TOTAL EXPENSES		\$28,492.18	\$23,055.02	\$28,868.30	\$57,842.00	\$74,787.00	Increase due to addition of lobbyist
	BALANCE		\$1,269.84	\$13,981.12	\$5,583.82	\$138.00	\$113.00	