

# Canadian Dental Assistants' Association Strategic Business Plan 2020-2023



**Mid-Plan Evaluation & Review**  
**August 31, 2021**

## INTRODUCTORY STATEMENT

This strategic business plan has been developed by the Canadian Dental Assistants' Association (CDAA) to provide a disciplined, transparent approach to the management of the Association, for fiscal years 2020-2023.

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## EXECUTIVE SUMMARY

The CDAA Strategic Business Plan for 2020-2023 expands on the commitment of the Canadian Dental Assistants' Association (CDAA) to advance the dental assisting profession as it has for the past 75 years. Building upon the momentum of the 2017-2019 strategic business plan, this plan focuses on strengthening the long-term sustainability of the organization, both financially and with an eye towards activities that will have a direct, positive impact on the careers of dental assistants. Highlighted throughout this plan is the continued importance placed on the strength of the relationships with the provincial associations, both member provinces and otherwise. CDAA continues to be committed to open, transparent dialogue with all provincial jurisdictions and values the input from all across Canada in order to ensure the Association moves forward with the maximum amount of support possible. In addition to strengthening the domestic relationships across the profession, this plan further expands on the concept of collegiality and broadens CDAA's connections to dental assisting industry partners, oral health industry partners, both in Canada and abroad. CDAA will continue to mobilize concretely around these strategic directions as a cohesive unit in order to maximize available opportunities, address challenges and improve the profession of dental assisting.

### **Mid-Plan Evaluation & Review – August 2021**

On August 31, 2021, the Board of Directors undertook a mid-plan review of CDAA's 2020-2023 Strategic Plan. The objective of this meeting was to objectively review the status of the deliverables and activities outlined in the plan and to adjust the future activities of the CDAA for the remaining period of the plan. As well, Directors discussed amendments to future initiatives and governance beyond 2023 to prepare for upcoming work linked to the Governance Consultations that took place through the first two quarters of 2021. The outcomes of the August 21, 2021 discussion will be used to inform in-person discussion in November of 2021 as well as to inform discussions and potential decisions anticipated at the CDAA Annual General Meeting in the spring of 2022.

## HISTORY OF THE CANADIAN DENTAL ASSISTANTS' ASSOCIATION

The Canadian Dental Assistants Association (CDAA) is operated by a volunteer Board of Directors of up to 14 members, including: the President, Past President, Vice President, one representative from each CDAA Organization Member, one representative from the Royal Canadian Dental Corps and other positions the Board deems necessary.

The President, Past-President and Vice President each serve a one-year term, with the option of extending their term to a maximum of six years over three consecutive terms.

Provincial and Territorial representatives are elected or appointed to a two-year term, which can be extended to a maximum of six years over three consecutive terms.

The officers of the CDAA are the President, Past-President, Vice President and the Executive Director.

**1926:** Marion Edwards begins organizing dental assistants in Eastern Canada.

**1945:** A meeting held in Winnipeg to organize a national organization. Marion Edwards is elected first President of the Canadian Dental Nurses & Assistants' Association (CDNAA).

**1956:** Mary Groszek (Fullerton) elected President. Ms. Fullerton's main focus was on National Incorporation

**1957:** CDNAA becomes legally incorporated.

**1960:** CDNAA establishes continuing education study courses and higher standards towards national certification.

**1968:** First 136 members are nationally certified.

**1982:** The CDNAA officially becomes the Canadian Dental Assistants' Association (CDAA)

**1997:** First transfer membership agreements signed with Alberta, PEI, Nova Scotia and New Brunswick.

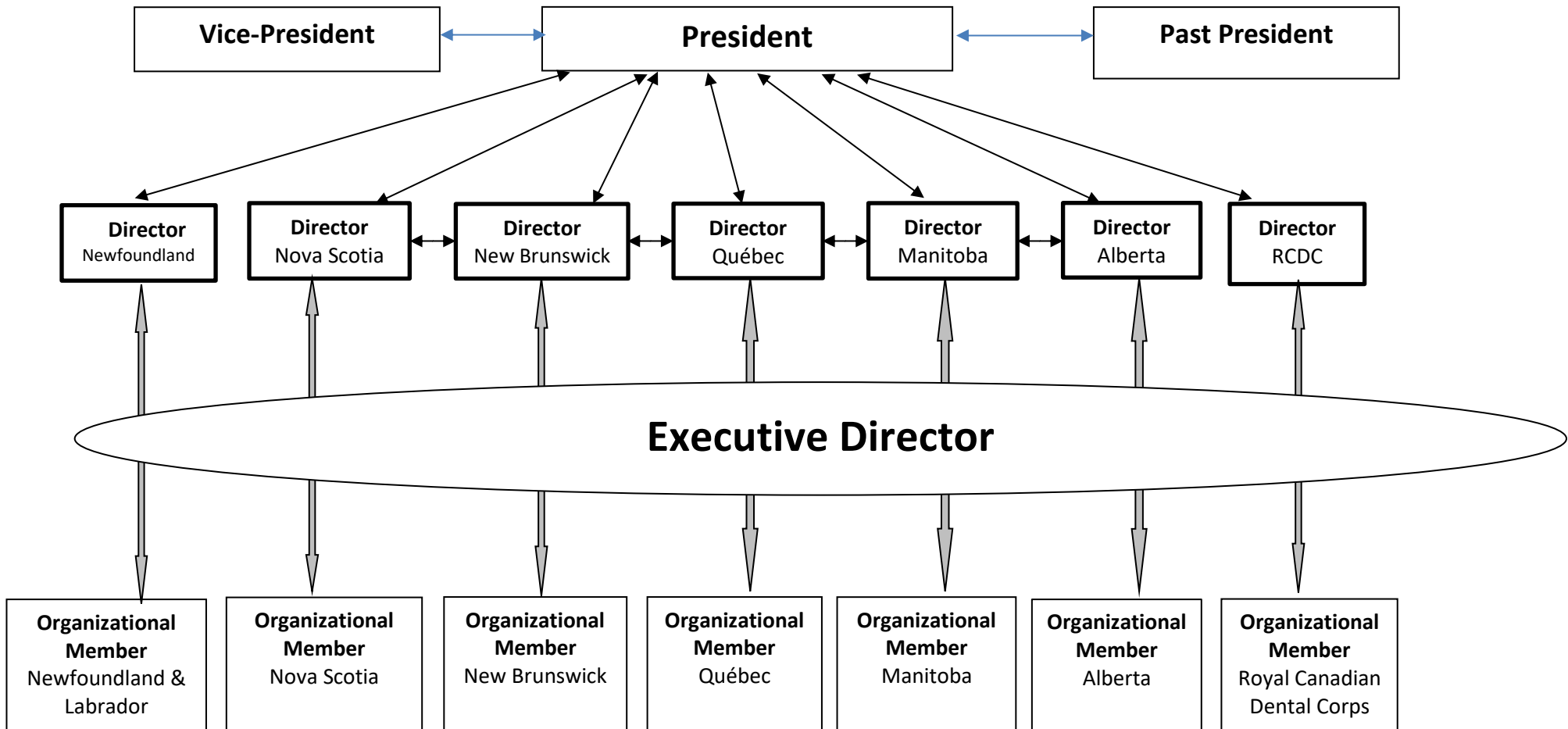
**1998:** The National Dental Assisting Examining Board (NDAEB) is created to oversee the national certification and examination process. Transfer membership agreements were signed with 8 provincial dental assisting associations resulting in CDAA membership increasing to 17,000 making the CDAA Canada's largest association of dental professionals.

**1999:** An International Alliance was formed with the American Dental Assistants Association.

- 2000:** Manitoba becomes the 9th provincial dental assisting association to enter into a transfer membership agreement.
- 2001:** CDAA changes bylaws to reflect the importance of the transfer agreements and the need for provincial associations to have a say in CDAA affairs. Quebec Dental Assistants Association signs transfer membership agreement. CDAA partners with the NDAEB to complete the first National Occupational Analysis for dental assisting. Dental Assisting Educators of Canada (DAEC) became a sub-committee of the CDAA.
- 2004:** The Canadian Forces joined CDAA as the 11th Corporate Member.
- 2006:** CDAA becomes a federation of ten provincial dental assisting associations and the Canadian Forces Dental Services.
- 2008:** Mutual Recognition Agreement signed by all Dental Assisting Regulatory Authorities, Ontario Dental Assistants Association and the Quebec Dental Assistants Association.
- 2009:** The first national online Salary & Benefits survey conducted. CDAA achieved financial stability.
- 2010:** DAEC rejoin CDAA as a standing committee. Emergency policy created for provincial dental assisting associations in need.
- 2011:** CDABC ceases to be a member of CDAA. CDAA launches a new website and online continuing education.
- 2012:** ODAA ceases to be a member of CDAA.
- 2013:** DAEC ceases to be a standing committee.
- 2014:** SDAA ceases to be a member of CDAA.
- 2015:** CADA ceases to be a member of CDAA. CDAA sunsets its online delivery of continuing education. CDAA focuses heavily on dental assisting research and launches a dental assisting research project reporting on stressors in the workplace.
- 2016:** CDAA launches a joint research project with the CFDHRE on the impact to the hearing of dental assistants and hygienists.
- 2017:** Association of Alberta Dental Assistants joins the CDAA
- 2018:** CDAA launches its Healthy Workplace Survey
- 2019:** CDAA partners with the CDA to launch a survey examining the employment of DAs in Canada; CDAA co-leads the NOA 2019 project

# CDA ORGANIZATIONAL CHART

## MANAGEMENT BOARD AND STAFF



# ORGANIZATIONAL TENETS

## ORGANIZATIONAL VISION

The CDAA is a collaborative, unified federation<sup>1</sup> recognized as a national leader for the dental assisting profession.<sup>2</sup>

## MISSION STATEMENT:

CDAA's mission is to provide national leadership for the dental assisting profession furthering the interests of its Organizational Members and advocating from a dental assisting perspective on oral health issues having national impact.

## VALUES:

CDAA helps to advance awareness of the role of dental assistants in patient care and advocate for dental assistants through our three core values:

1. Advocacy and Policy Influence
2. Knowledge and Research, and
3. Capacity Building for our Organizational Members.

<sup>1</sup> An association, comprised of a set of smaller associations, which seeks to bring attention to issues that are of importance to its members. Each association that comprises the **federation** maintains control over its own operations.

<sup>2</sup> CDAA works to effectively further the interests of all Canadian dental assistants, not just those represented by our member associations.



# CDAA S.W.O.T. ANALYSIS AS AT 2019

*(Strengths, Weaknesses, Opportunities, & Threats)*

## STRENGTHS

### Internal

- invested and committed leadership - cohesive Board of Directors speaking with a unified voice
- supportive Organizational Members
- Organizational Member confidence in CDAA continuing to grow
- solid internal governance structure – clear by-laws, clearly defined roles and responsibilities, governance policies.
- committed, capable, efficient office support staff
- lower overhead costs given move to virtual/home office model
- strong policies and practices regarding internal financial controls – dual signatories, monthly financial statement reviews, monthly Board meetings, annual audit, etc.
- zero long-term liabilities
- secure, financial investments exceeding \$120K
- internal control policies updated and implemented (i.e. GST policy/PIPEDA compliance/anti-theft & fraud/anti-harassment/accessibility)
- streamlined records management (both soft and hard records)
- secure records (both soft and hard records)
- competent IT service providers in place
- updated and secure Website

### External

- positive, strengthened relationship with oral health industry stakeholders (i.e. NDAEB, RCDC, Provincial associations)
- positive, strengthened relationships with oral health industry partners (i.e. CDA, CDHA, ADAA)
- increased opportunities for research specific to dental assisting

## External *cont'd*

- credibility and inclusivity of the Association amongst industry partners, despite lack of representation coast to coast, continues to improve and expand
- perception of the legitimacy of the Association amongst industry partners continues to improve given new proactive approach to participation and quality of contributions
- significant increase in invitations to participate on national level initiatives led by oral health industry partners and stakeholders
- support of the Chief Dental Officer of Canada
- inclusion in the Network for Canadian Oral Health Research (representation on Steering & Communications Committees)
- contributor to the Canadian Oral Health Roundtable
- participation and contributor to Government of Canada consultations
- offers malpractice insurance to CDAA members at a low-cost rate, protecting thousands of dental assistants
- loyalty program with BMO Mastercard and Local Hospitality travel services provided offered to member dental assistants

## WEAKNESSES

### Internal

- 48% reduction in overall operating capital in 2016
- lack of operating funds resulting in significant annual losses for three years in a row
- lack of operating funds results in reduced levels of activity and initiatives
- long-term planning is difficult due to the high impact Organizational Members' decisions have on the Association
- no future IT plan (i.e. website development/update)
- out-dated office technologies and equipment
- time commitment required of Directors results in low volunteerism at the Organizational Member-level

- time commitment required of Directors results in low volunteerism at the Organizational Member-level
- small numbers on Board results in volunteering Directors taking on numerous roles in order to get job completed (i.e. President / directors on multiple committees)
- lack of strong succession planning for incoming Directors at the Organizational Member level
- President/Vice President/Past President terms only one-year in length
- low response rates from Organizational Members to requests for feedback/consultation on initiatives and activities
- limited communications received from Organizational Members regarding provincial issues

## External

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

## OPPORTUNITIES

### Internal

- pursuing research specific to dental assisting
- commitment of Board to pursuing activities to elevate the profession across Canada
- openness of Board to exploring new ideas and business activities/models to improve service-delivery
- improving transparency of the Association
- improving communication between Board, Organizational Members and individual dental assistants
- shift to activities with a national scope
- continuation in the reduction of member-service related activities

- improving relevant policy development on an on-going basis
- updating office technologies and equipment
- development of an IT plan with a focus on updating technologies/website
- moving towards an e-based system of records management to improve, streamline and reduce costs
- update accounting and banking practices to improve efficiency and reduce costs

## External

- strengthening linkages with former Organizational Members
- formalizing agreements with former Organizational Members to re-join the Association in some capacity
- improving communication and relationships with former Organizational Members on initiatives and opportunities for partnerships
- increasing contributions to our initiatives by former Organizational Members
- strengthening of communication and relationships with Federal Government
- increase in invitations to contribute/participate on national level initiatives led by oral health industry partners and stakeholders
- increase in invitations to contribute/participate on national level initiatives led by oral health industry partners and stakeholders
- contribution/participation at national-level events with oral health industry partners and stakeholders
- communication and relationship-building with oral health industry partners (i.e. hygienists, dentists, oral health researchers, etc.)
- improving marketing and communication with a national voice
- assisting with the development of capacity across all provincial jurisdictions

# THREATS

## Internal

- 48% reduction in overall operating capital, effective 2016
- lack of operating funds to complete activities and initiatives
- financial status of remaining Organizational Members
- timing of decision-making to address future budget shortfall
- focus on Organizational Members versus former Organizational Members, rather than building relationships, partnerships and initiatives across the country for the elevation of the profession
- arrival of new Board members may reduce cohesiveness of Board
- reduction in Organizational Members commitment to national association
- non-delivery on identified key priorities
- burnout of Directors and CDAA staff as they try to deliver on mandate and meet Organizational Member expectations and stakeholder needs

## External

- former Organizational Members lack of willingness to partner with CDAA
- former Organizational Members financial stability
- diminishing memberships in some provincial jurisdictions
- little to no membership in some provincial jurisdictions
- low awareness/promotion of CDAA work at the provincial level
- lack of regulation in some provinces
- demographic/societal shift as “me” generation enters labour force
- attrition in the profession
- low National Occupation Classification impacting federal policy delivery

# KEY PRIORITIES

## 1. National Level Advocacy & Policy Influence

### 1.1 To unify the profession of dental assisting across Canada

Objective	Action Steps	Persons	Year	Milestones	Resources	Mid-Plan Evaluation
To address the current needs of Organizational Members (OMs).	1. Assist and support membership recruitment efforts and activities in provincial jurisdictions.	Representative(s) from CDAA Board + CDAA Executive Director (ED) + Executive of Provincial Associations, as required.	2020 & <i>on-going...</i>	Dependent on needs/invitation/ activities/events of OMs.	Individuals to participate in meetings/recruitment events. \$ - allocated dependent on number of events/invitations received from provincial associations	These activities depend solely on the invitation of the OMs. In addition, the Covid-19 pandemic during 2020-2021 limited opportunities for the CDAA to engage. ED of the CDAA did participate virtually in the 2021 NSDAA AGM. In general, the Board felt that the CDAA had done a good job of supporting its members over the previous 18 months. It was noted that the regulatory landscape is changing across Canada and that this is a risk to associations. CDAA supported our members as they navigated potential changes to their provincial regulations. It was also noted that keeping professional liability insurance with associations is key to maintaining the sustainability of provincial associations over the long-term.

Objective	Action Steps	Persons	Year	Milestones	Resources	Mid-Plan Evaluation
To address the needs of <u>former</u> Organizational Members (OMs).	<p><b>1.</b> Develop agreements of affiliation with former OMs who are interested in joining CDAA.</p> <p><b>2.</b> Assist and support membership recruitment efforts in provincial jurisdictions for former OMs, who <u>are</u> affiliated with CDAA.</p> <p><b>3.</b> Continue to build relationships and provide support to DAs in provinces where no association currently exists.</p>	Representative(s) from CDAA Board + CDAA Executive Director (ED) + Executive of Provincial Associations, as required.	2020 & <i>on-going...</i>	Dependent on needs/invitations/events of <u>former</u> OMs.	<p>Individuals to participate in meetings and ED time allocated to negotiations and preparation of correspondence.</p> <p>\$ - Legal consultation, if required.</p> <p>\$ - depends on number of events/invitations received from provincial associations</p> <p>Individuals to participate in meetings/events.</p>	<p><b>Action Steps 1 &amp; 2:</b> CDAA was unable to develop agreements of affiliation with former OMs. However, the Governance Consultations in 2021 are a component of this objective and a steppingstone to improved engagement and possible future affiliation agreements.</p> <p><b>Action Step 3:</b> Over 2020 and 2021 the CDAA provided support to all provinces on the topic of Covid-19 and related information.</p>
Objective	Action Steps	Persons	Year	Milestones	Resources	Mid-Plan Evaluation
To increase pan-Canadian knowledge of issues facing dental assistants across all provincial jurisdictions.	<p><b>1.</b> CDAA ED to hold a one-hour per quarter conference call attended by all provincial associations to share regional issues.</p>	Representatives from each provincial jurisdiction + CDAA ED	2020 & <i>on-going...</i>	4 provincial conference calls per year.	<p>Representatives to attend meetings.</p> <p>\$ - conference call platform through existing CDAA service provider.</p>	<p>The ED reported that the provincial calls are occurring on a quarterly basis. It was suggested that going forward these calls be topic-focused and that provincial associations be invited to discuss relevant, current topics of interest rather than reporting in on activities of the association. The outcomes of these discussions will then form the basis of CDAA's future work/focus. The change in format of the quarterly calls will begin in January 2022.</p>

Objective	Action Steps	Persons	Year	Milestones	Resources	Mid-Plan Evaluation
To develop opportunities to partner on issues relevant to the profession with associations regardless of their membership status in CDAA.	<b>1.</b> Examples, such as but not limited to: <ul style="list-style-type: none"> <li>• Surveys,</li> <li>• Research partnerships,</li> <li>• Awareness campaigns.</li> </ul>	Representatives from each provincial jurisdiction + relevant CDAA Director + CDAA ED, as required	2020 & on-going...		\$ - will depend on the nature of the opportunities brought forward by provincial associations.	CDAA was able to provide information; engaged in surveys, and; raised awareness on pandemic-related resources and topics, with all jurisdictions as it navigated the Covid-19 pandemic from 2020-2021.

### 1.2 To become a stronger national voice for the profession of dental assisting

Objective	Action Steps	Persons	Year	Milestones	Resources	Mid-Plan Evaluation
To become an operationally strong and sustainable organization.	<b>1.</b> Review and amend the existing CDAA governance structure and by-laws <b>2.</b> Increase membership fees to ease financial pressures on CDAA and improve on-going stability. <b>3.</b> Establish a “finance committee” to examine opportunities for growth, development and funding sources. <b>4.</b> Explore opportunities to partner with CDAA’s industry partners as a source of funding to assist CDAA.	Representative(s) from CDAA Board + Members of Bylaws & Governance Committee in consultation with OMs + Operational support from CDAA ED	2020 & on-going... (estimated completion date of Q3 2020 for bylaws review)	Bylaws & Governance Committee review of bylaws- Q4 2018 to 2019.  <i>Vote carried at AGM 2018 to increase fees in 2020 by \$10.</i>	Individuals to participate in meetings and ED time allocated to negotiations and preparation of documentation.  \$ - Legal consultation, if required.	<b>Action Steps 1&amp;2:</b> Delayed due to the focus on the Covid-19 pandemic and its impact on the profession in 2020. Consultations on the existing CDAA governance structure began only in Q1 of 2021. Amendments to governance and membership fees likely in late 2022/2023 following AGM 2022. <b>Action Step 3: Finance Committee established in 2022 (completed).</b> *Need additional volunteers to participate. Callout for participants- <i>completed in September 2021.</i>



Objective	Action Steps	Persons	Year	Milestones	Resources	Mid-Plan Evaluation
To participate and be consulted at the national level on issues related to oral health.	Participate in/contribute to national level forums such as, but not limited to: 1. Canadian Oral Health Roundtable (COHR) 2. NCOHR 3. GoC consultations	Representative(s) from CDAA Board + CDAA ED	2020 <i>and on-going...</i>		Representative(s) from CDAA Board + CDAA ED  \$ to participate - dependent on event/initiative	<p><b>Action Step 4:</b> It was acknowledged that receiving funding from CDA or CDHA was unlikely. Suggestion that the funding committee pursue opportunities with dental supply companies and to update the CDAA sponsorship opportunities.</p> <p>The CDAA became a member of the Organization for Health Action (HEAL) as of 2020. Members of the CDAA Board are members of the inter-professional Healthy Workplace Working Group (HWWG) as of 2020. CDAA has agreed to become a contributor to the work of Canadian Health Workforce Network (CHWN) to advance health workforce information to address the gaps in knowledge brought to light during the Covid-19 pandemic.</p>

### 1.3 To raise awareness and increase visibility of the profession of dental assisting

Objective	Action Steps	Persons	Year	Milestones	Resources	Mid-Plan Evaluation
To participate and be consulted at the national level on issues related to oral health.	Participate in/contribute to national level forums such as, but not limited to: <ul style="list-style-type: none"> <li>• Canadian Oral Health Roundtable (COHR)</li> <li>• NCOHR</li> <li>• GoC consultations</li> </ul>	Representative(s) from CDAA Board + CDAA ED	2020 <i>and on-going...</i>		Representative(s) from CDAA Board + CDAA ED  \$ to participate - dependent on event/initiative	CDAA was able to provide information; engaged in surveys, and; raised awareness on pandemic-related resources and topics, with all jurisdictions as it navigated the Covid-19 pandemic from 2020-2021. In addition, the CDAA was fully engaged in responding to Government of Canada consultations on a variety of nationally-focused topics. CDAA contributed to large-scale topics of interest to the health sector through its continued engagement with the Organization for Health Action (HEAL).
To develop a year-long 75 <sup>th</sup> anniversary celebration of dental assisting in Canada	<ol style="list-style-type: none"> <li>1. Develop marketing strategy</li> <li>2. Develop celebration strategy</li> <li>3. Events/opportunities</li> </ol>	CDAA Board + ED + OMs + former OMs + industry partners + industry stakeholders			\$ to participate- dependent on event/initiative + Corporate sponsors + Representative(s) from CDAA Board + CDAA ED + OMs	75 <sup>th</sup> anniversary celebrations were deferred due to the pandemic-defer large-scale celebrations to 2025 for the 80 <sup>th</sup> celebration. Future celebration will be reflected in the strategic plan post-2023. During AGM 2022 a small momento to recognize the 75 <sup>th</sup> anniversary should be provided.

To develop a partnership with industry partners on a cause of mutual interest	<ol style="list-style-type: none"> <li>1. Investigate opportunities</li> <li>2. Develop marketing strategy</li> <li>3. Develop Opportunities</li> </ol>	CDAA Board + ED +OMs + Former OMs + industry partners	Throughout 2020 ... <i>and beyond</i>		\$ to participate- dependent on event/initiative + Corporate sponsors + Representative(s) from CDAA Board + CDAA ED + OMs	To date the CDAA has engaged with the CDA on developing an action plan to address the findings of the FREEDAC research study. Work was delayed on this in 2020, but began again in 2021. It is the intent to finalize an action plan in early 2022. In 2021, the CDAA engaged with the CDHA to launch an initiative to improve/standardize newborn information in all provinces. This work will evolve over the remainder of this strategic plan. During the remainder of the strategic plan, CDAA will pursue stronger relationships with the denturist and dental technician associations.
Objective	Action Step	Persons	Year	Milestones	Resources	Mid-Plan Evaluation
To participate at oral health initiatives in conjunction with industry partners.	Participate in/contribute to national level forums such as, but not limited to: <ol style="list-style-type: none"> <li>1. Canadian Oral Health Roundtable (COHR)</li> <li>2. NCOHR</li> <li>3. GoC consultations</li> <li>4. Research</li> </ol>	Representative(s) from CDAA Board + CDAA ED	2020 & <i>on-going</i>		Representative(s) from CDAA Board + CDAA ED  \$ to participate- dependent on event/initiative	CDAA was able to provide information; engaged in surveys, and; raised awareness on pandemic-related resources and topics, with all jurisdictions as it navigated the Covid-19 pandemic from 2020-2021. In addition, the CDAA was fully engaged in responding to Government of Canada

						consultations on a variety of nationally-focused topics. CDAA contributed to large-scale topics of interest to the health sector through its continued engagement with the Organization for Health Action (HEAL).	
To increase awareness of CDAA's objectives amongst provincial associations, oral health partners, industry partners, dental assistants, GoC, internationally and the public.	1. Quarterly reports and letters to provincial associations, oral health partner and industry partners.	Representative(s) from CDAA Board + CDAA ED Representative(s) from CDAA Board + CDAA ED + Office of CDO	2020 & on-going	On-going...	ED to prepare updates and reports.	Quarterly reports submitted to OMs; quarterly Presidential message also submitted to OMs ( <i>completed to date</i> and on-going). Suggested going forward with a more dynamic format for the quarterly report. Suggested a video recording in place of a written report.	
	2. Annual reports shared with industry partners.			After approval of financial statements		ED to prepare report; Board to approve	<i>2020 Annual reports circulated and post to CDAA website (completed)</i>
	3. Partner with CDA Oasis to share information, research and initiatives.			As appropriate throughout the calendar year		ED to prepare communiqués; Board to approve + CDA Oasis	Deferred as the CDA OASIS was focused completed on Covid-19 throughout 2020 and most of 2021. CDAA to explore opportunities during the remaining period of this plan.
	4. To build a stronger relationship and support between the CDAA and the National Dental Assisting Examination Board					ED to prepare communiqués; Board to approve and participate	4. Yes. The CDAA and the NDAEB collaborated fully during 2020 and Q1 of 2021 to complete the National Occupational Analysis. Over the remaining period of this

<p>5. To build a relationship and foster information sharing and support between the CDAA and the international dental assisting community</p>						<p>plan, opportunities to engage with schools and students with the assistance of the NDAEB will be the focus.</p>
<p>6. To communicate regularly with Government on issues relevant to the profession.</p>						<p>5. Through establishing the IFDAN in 2020, the CDAA has laid the groundwork to build an international dental assisting community and connect the profession on a global scale. 6. CDAA interacts regularly with the Office of the Chief Dental Officer. CDAA is a Health Canada stakeholder responding to health sector topics. In 2020 and 2021, the CDAA has engaged with the Government of Canada on topics related to the Covid-19 pandemic.</p>
<p>7. To continue regular postings on social media (Twitter/FB)</p>	<p>CDAA ED + CDAA staff</p>				<p>CDAA Staff to prepare; ED to approve</p>	<p>7. The CDAA acknowledges that FB and Twitter posts have been irregular over the past year due in part to the Covid-19 pandemic and its impact on the work of the CDAA. Over the 18 months the CDAA will explore engaging a university student on a volunteer basis to assist with expanding CDAA's online content. This is seen as a potential initiative to engage with the NDAEB and schools.</p>

## 2. Knowledge and Research

### Specific Objectives:

#### 2.1 To focus on research related to the profession of dental assisting

Objective	Action Steps	Persons	Year	Milestones	Resources	Mid-Plan Evaluation
To develop position statements on subjects of importance to the dental assisting profession.	Completion of position statements relevant to current environment	CDAA Board + Members of KT Committee + input from OMs + former OMs + support of CDAA ED	2020 & on-going	<i>Master list of topics completed in 2019.</i>	CDAA Board + KT Committee + input from OMs + former OMs + CDAA ED	In 2021 the CDAA updated its position statement on oral health standards in LTC facilities. Work is underway to create a position statement on the need for regulation. Over the remaining period of this plan a paper on self-regulation to be developed.
To initiate activities stemming from research related specifically to the dental assisting profession.	1. Partner with the CDHA and CDA on interprofessional initiatives related to the Healthy Workplace study.	CDAA Board of Directors + OMs + provincial associations + CDHA & CDA		<i>Timelines dependent on partner agreed timelines</i>	ED to oversee project on behalf of CDAA; Board to approve activities.	

	<p><b>2.</b> Partner with CDA on inter-professional initiatives related to the outcomes of <i>Factors, Realities of Employment of Dental Assisting in Canada</i> study</p>	<p>CDA Board of Directors + OMs + provincial associations + industry partners + CDA ED</p>		<p><i>Timelines dependent on completion of research currently underway.</i></p>	<p>ED to oversee project on behalf of CDA; Board to approve activities.</p>	<p>2. To date the CDA has engaged with the CDA on developing an action plan to address the findings of the FREEDAC research study. Work was delayed on this in 2020 due to Covid-19, but it began again in 2021. It is the intent to finalize an action plan in early 2022.</p>
	<p><b>3.</b> Develop protocol related to the reporting of suspected family violence incidences.</p>	<p>CDA Board + KT Committee + industry experts + OMs + former OMs + CDA ED</p>			<p>ED to oversee project on behalf of CDA; KT Committee to draft protocol; Board to approve.</p>	<p>3. This protocol is no longer necessary as the need was addressed via the material provided through the VEGA project. As a replacement throughout the remaining time of this plan, the CDA will develop a Compensation and Benefits survey for completion in 2022.</p>
	<p><b>4.</b> Develop toolkit for dental assistants to assist with employment choices and throughout their career.</p>			<p>Questionnaire to circulate via OMs/ provinces/CDA FB page to gain feedback.</p>	<p>ED to oversee project on behalf of CDA; KT Committee to draft protocol; Board to approve.</p>	<p>4. This initiative was on hold during the previous 18 months due to the Covid-19 pandemic but will be completed over the remaining period of this plan with a launch date in 2023. This toolkit will include contract negotiation guidelines/tips; act as a hub of information for schools and students and be accessible by CDA members only.</p>

Objective	Action Steps	Persons	Year	Milestones	Resources	Mid-Plan Evaluation
	5. To partner with international DA associations to institute research on self-regulation	CDAА Board + KT Committee + international associations + OMs + former OMs + CDAА ED	2020 & on-going	<i>Timelines dependent on partner agreed timelines</i>	ED to oversee project on behalf of CDAА; Board to approve activities.	5. As the CDAА has been instrumental in establishing the International Federation of Dental Assistants and Dental Nurses (IFDAN) during 2020, this research will be IFDAN’s responsibility. Should this research move forward in the future, CDAА will provide input.
	6. To partner with NCOHR for research on inter-professional dental education to improve dental team efficacy and interprofessional relations.	CDAА Board of Directors + OMs + provincial associations + industry partners + CDAА ED		<i>Timelines dependent on partner agreed timelines</i>	ED to oversee project on behalf of CDAА; Board to approve activities.	6. CDAА will explore opportunities to conduct research specific to dental assisting.

**2.2 To develop policies related to key issues related to the oral health profession/industry.**

Objective	Action Steps	Persons	Year	Milestones	Resources	Mid-Plan Evaluation
To identify issues and topics of importance to the oral health industry.	<i>Dependent on current environment.</i>	Representative(s) from CDAА Board + input from OMs + former OMs + CDAА ED	2020 & on-going		Representative(s) from CDAА Board + Members of KT Committee + input from OMs + former OMs+ CDAА ED	Throughout 2020 and 2021 the focus was on the Covid-19 pandemic and vaccine hesitancy. For the remaining part of this plan focus will return to those initiatives that were delayed over the past 18 months.



### 3. Capacity Building for our Organizational Members

#### Specific Objectives:

#### 3.1 To focus on effective communication with all provincial jurisdictions

Objective	Action Steps	Persons	Year	Milestones	Resources	Mid-Plan Evaluation
To increase communication between CDAA, OMs & provincial jurisdictions.	1. Maintain CDAA's website, Facebook and Twitter pages with up-to-date, relevant postings.	CDAA ED and Staff	2020 & <i>on-going</i>	As required throughout each calendar year	ED and CDAA Staff to prepare postings; Board to approve	1. The CDAA acknowledges that FB and Twitter posts have been irregular over the past year due in part to the Covid-19 pandemic and its impact on the work of the CDAA. Over the remaining period of this plan, these posts will increase as the focus shifts away from Covid-19.
	2. Quarterly reports provided via email to oral health and industry partners.			Each quarter of the calendar year	ED to prepare report  \$ for translation costs	2. Quarterly reports submitted to OMs; quarterly Presidential message also submitted to OMs ( <i>completed to date</i> and on-going)
	3. CDAA ED to hold a quarterly conference call attended by all provincial associations to share issues they are facing in their regions. CDAA ED to provide debrief to CDAA Board at monthly Board meeting.	CDAA ED + representative from each provincial jurisdiction.				Representatives to attend meetings.  \$ conference call cost - through service provider.

						of interest rather than reporting in on activities of the association. The outcomes of these discussions will then form the basis of CDAA's future work/focus. The change in format of the quarterly calls will begin in January 2022.
	4. Produce an annual report at the fiscal year end to be shared with each provincial jurisdiction.	CDAA ED with input from Board	December 2020 December 2021 December 2022	Draft report including year-end financial statements to be submitted to Board for review in Q2 of subsequent calendar year.	CDAA ED + Board members  (Associated cost of auditors to prepare year end financial statements)	4. Annual report 2020: completed and posted to CDAA website and circulated to OMs.
Objective	Action Steps	Persons	Year	Milestones	Resources	Mid-Plan Evaluation
To dramatically increase OM participation and support of CDAA initiatives.	Develop a strategy for increased engagement between OMs and CDAA.	CDAA Board + OMs + CDAA ED	2020 & on-going		CDAA ED + Board members to draft strategy + consultations with OMs	To be developed during the remaining 18 months of this plan. To include amendments to OM agreements based on governance consultations and outcomes from November 2021 Board discussions.

To provide support and guidance to dental assistants wanting to establish an association in their provincial jurisdiction.	Continue to build relationships and provide support to DAs in provinces where no association currently exists	CDAA Board + CDAA ED	2020 & on-going		Representative(s) from CDAA Board + CDAA ED	The CDAA ED continues to engage and offer support to DAs in PEI and Canada's north. Over the coming 18 months, and subsequent to the outcomes of the governance consultations the CDAA intends to solidify these relationships in a more formal manner.
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**3.2** To focus on cost-saving initiatives in the administration of the Association in order to develop capacity to deliver on priorities given existing budgetary constraints.

Objective	Action Steps	Persons	Year	Milestones	Resources	Mid-Plan Evaluation
To further reduce CDAA expenses to address budget shortfalls and maintain sustainability of the Association.	1. Potentially layoff CDAA administrative staff.	CDAA Board + CDAA ED	2020 & on-going	<i>E-Newsbrief cancelled March 2019 = \$16,000 savings. Cancellation of bookkeeper summer 2019 = yearly savings of \$10,600.</i>	Representative(s) from CDAA Board + CDAA ED	<i>Completed-termination of CDAA Administrative Assistant position in October 2020 = yearly savings of \$36,500.</i> Finances are monitored carefully through monthly review of the financial statements.

## SUMMATIVE EVALUATION

A summative evaluation involves demonstrating that what has (or has not) been achieved insofar as a strategic plan is concerned. During the summative evaluation, CDAA's performance is rigorously examined with respect to whatever goals and objectives are outlined in the current strategic plan. In addition, the CDAA organizational tenets are evaluated to the extent to which values have been practiced, missions accomplished and visions achieved during the implementation of the activities outlined in this document.

The summative evaluation will be led by the CDAA Renewal Committee in consultation with CDAA Board of Directors, CDAA Executive Director, CDAA Organizational Members (OMs) and provincial associations who participated in the activities outlined in this strategic plan. The summative evaluation process will begin each year in January, following the fiscal year end of the last year of the current strategic plan (i.e. January 2021) and will be completed prior to the Annual General Meeting of the CDAA (i.e. June 2021). Evaluation findings, highlighting successes and noting areas for improvement will be formally presented to OMs at the CDAA Annual General Meeting.

The summative evaluation will be used to inform the subsequent cycle of strategic planning for the CDAA.