

# **Operating Manual For Constituent and Component Officers**



American Dental Hygienists' Association  
444 N. Michigan Avenue, Suite 3400  
Chicago, IL 60611

**2/2011**

# **AMERICAN DENTAL HYGIENISTS' ASSOCIATION**

The American Dental Hygienists' Association is the largest professional organization representing the interests of dental hygienists. Members enjoy professional support, educational programs, and numerous opportunities to participate in association decision making.

ADHA has grown to over 35,000 members in 51 constituents, over 350 components, and in several foreign countries. Approximately, 35 staff members service ADHA members from the office in Chicago, Illinois.

Constituents and components play an important role in meeting the needs of members at the local level. In most cases, they serve as the first line of contact to current and prospective members. ADHA understands the importance of their role and has developed this manual to facilitate such responsibilities.

This manual provides constituents and components with hands-on suggestions for recruiting prospective members, assisting with leadership transition, and meeting the needs of members. In addition, it includes a variety of materials to assist the constituent and component with financial issues/budgeting, school liaison activities, membership recruitment and retention, strategic planning, meeting planning, and more.

For more information, contact the ADHA's Division of Member Services at 312/440-8900, extension 1.

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# Leadership

Today's professional membership associations require sensitivity to members' needs and responsiveness to a constantly changing environment.

Leadership requires the ability to enable others to act; to involve others in planning the actions that affect them; to give people the freedom to make their own decisions; and to create an atmosphere of mutual respect and trust.

Leaders serve as role models and at the same time share common values with those they represent. Most importantly, leaders inspire a shared vision - the future for the association that can be created together.

## **ADHA Tripartite**

An association is a group of individuals who want to achieve goals that are to their mutual benefit and could not be accomplished on an individual basis. The American Dental Hygienists' Association was formed in 1923 to promote and protect the interests of the dental hygienist.

For an association to progress toward the achievement of its goals, it is necessary to have a structured organization on all levels. ADHA's organizational structure is based on a tripartite system of governance which means that all voting members must be members of ADHA, their constituent organization, and a where all membership categories in the tripartite system are identical.

The local dental hygienists' association, better known as the component, is the first level of contact for most members. There are over 400 active components across the country located within the 50 states and the District of Columbia known as constituents. The component should be specifically concerned with meeting the local needs of its members and at the same time representing the interests of its members to the state and national level.

The constituent is the state dental hygiene organization. It receives input from the local components through their elected representatives. The constituent either by their board or the House of Delegates sets policy and direction for state-wide needs and issues, such as licensing requirements and practice conditions. The constituent's governing body might be an Executive Board or Board of Trustees.

The national association is responsible for the implementation of activities and services for dental hygienists using the input of constituents and components as a basis.

Each part of the tripartite system works in a "circle of responsibility". This means, for example, that while national is responsible for federal advocacy, a national conference, brochure and branding development, the state would focus their resources on state advocacy, delivering local CE, and keeping membership in the loop with a newsletter/website. The local (or component) level would focus on social opportunities, mentoring, networking, community outreach, connecting with students, etc. We all have our strengths and should focus our resources accordingly.

Constituent and component leaders need to understand the organizational structure to know how their local organization fits into the association framework. Constituents and components are encouraged to develop a mission statement that outlines the purpose of the organization and is consistent with ADHA's Purposes and Mission Statement:

**ARTICLE I  
NAME AND PURPOSES**

Section 1. Name. The name of this corporation shall be the American Dental Hygienists' Association (hereinafter referred to as the "Association"), an Illinois not-for-profit corporation.

Section 2. Purpose. In addition to the purposes set forth in the Association's Articles of Incorporation, as may be amended, the purposes of the Association are to improve the oral health of the public; to advance the art and science of dental hygiene; to maintain the highest standards of dental hygiene practice; to represent and protect the interests of the dental hygiene profession; to improve the professional competence of the dental hygienist; to foster research in oral health; to provide professional communication; to publish a scientific journal: the Journal of Dental Hygiene; and to conduct other activities as may be permitted by the State of Illinois to carry out the purposes of this association.

Section 3. Mission. To improve the public's total health, the mission of the Association is to advance the art and science of dental hygiene by ensuring access to quality oral health care, increasing awareness of the cost-effective benefits of prevention, promoting the highest standards of dental hygiene education, licensure, practice, and research, and representing and promoting the interests of dental hygienists.

Section 4. Offices. The Association shall have and continuously maintain in the State of Illinois a registered office and a registered agent whose office is identical with that registered office and may have such other offices, within or without the State of Illinois, as the Board of Trustees may determine.

Before you can develop a mission statement, it should first answer the following key basic questions:

- Who are we? You need to know who the hygienists in your community are and if they would benefit from joining the association.
- What is the purpose of the organization? You need to identify what your association intends to accomplish.
- How will we meet our goals? You need to determine what activities and programs will be offered in order to attract potential members.

Once your association has identified its purposes and mission, the next step is to develop a strategic plan. The strategic plan will serve as a blue print for carrying out the organization's mission.

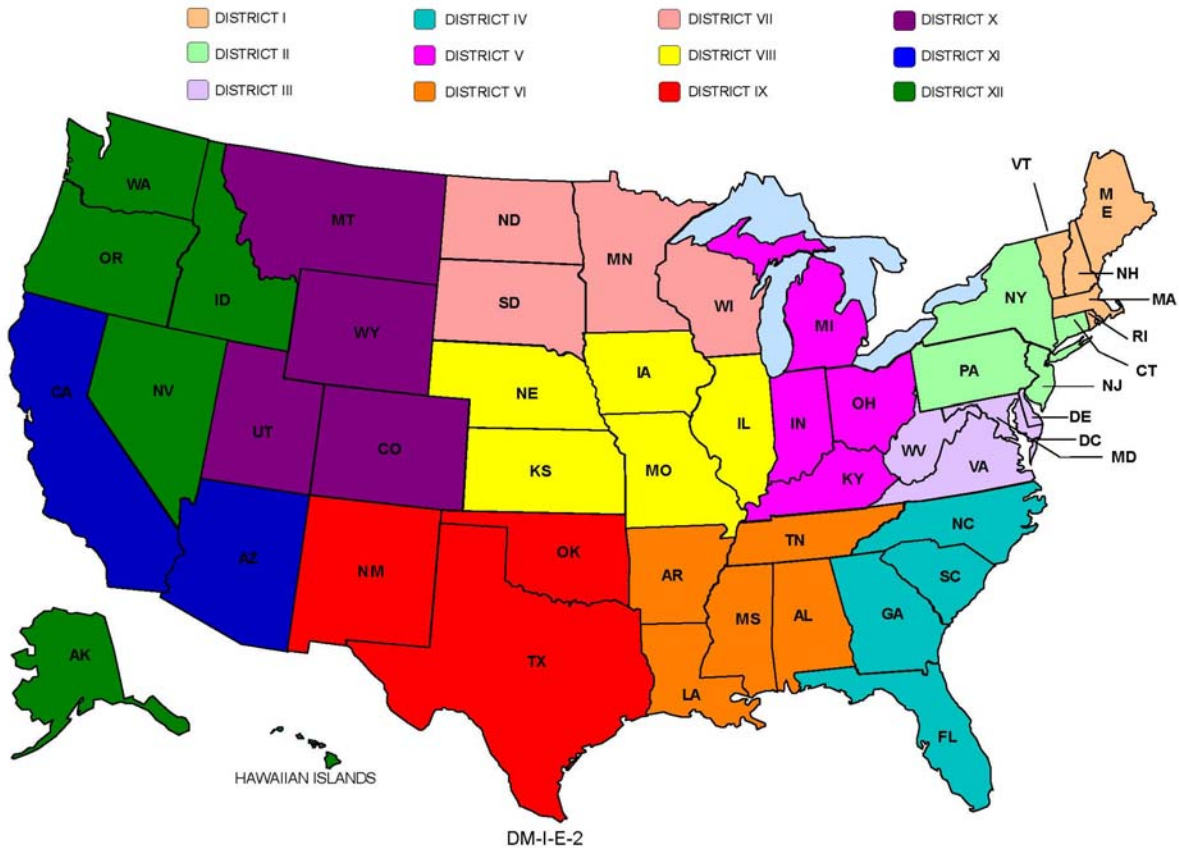
Before your association begins the strategic planning process, you may want to collectively brainstorm about ways to advance the association's mission.

**ADHA District Structure**

The constituents are grouped into twelve geographic districts. Each district elects one trustee to represent them on the national level. It is through this elected representative, the District Trustee, that the views and input from the constituents and components are voiced. The Trustees are considered the administrative body of the Association and are responsible for reviewing and adopting the association's budget; providing leadership and guidance to the constituents; and for reviewing reports of officers, councils, and committees, to name a few. Most importantly, the Trustees are the ambassadors to ADHA members.

ADHA is a national organization that represents the interests of over 150,000 dental hygienists nationwide. It is the voice of dental hygiene on issues dealing with preventive and therapeutic oral health care. The national association receives input directly from the constituents and components through the District Trustee, during the fall, winter, and Annual Session Board of Trustees Meetings.

## ADHA DISTRICTS



### ADHA Governance and Organization

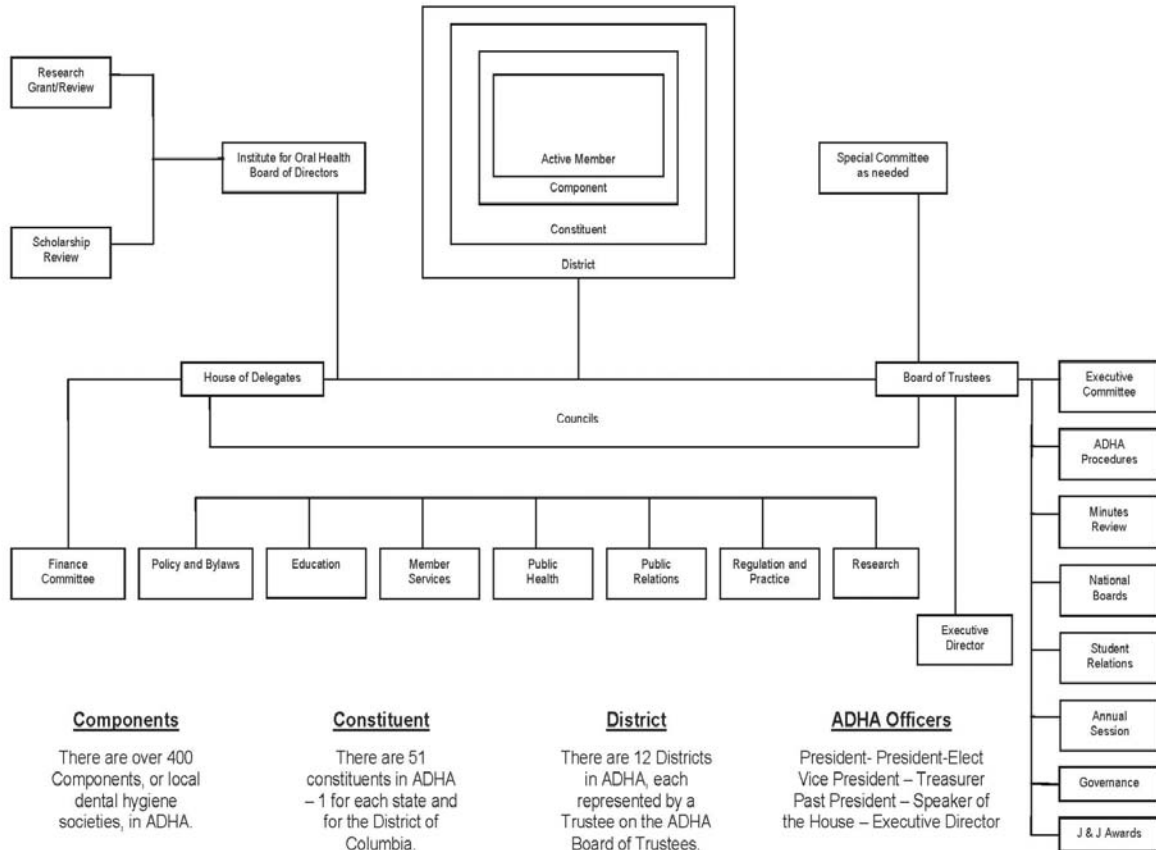
The House of Delegates (HOD) is the voting body of ADHA. It is similar to the House of Representatives in the federal government. The HOD consists of one delegate from each constituent plus one hundred additional delegates to be allocated among the constituents according to the ratio of voting members within the constituent to the total number of voting members of the Association. The delegates meet once a year at ADHA's Annual Session to vote on association policy and bylaws and to discuss professional issues.

The twelve District Trustees along with the President, President-Elect, Vice President, Treasurer, and Immediate Past President make up the Board of Trustees which is the administrative body of the association.

Annually, the President appoints individual dental hygienists to serve on ADHA's councils and committees. The councils and committees meet to discuss association activities and policies; to assess the progress of the programs voted on by the House of Delegates; and to recommend new programs and policies that should be incorporated into the Strategic Plan.

Following is an overview of the structure:

## American Dental Hygienists' Association Organizational Chart



DM-I-E-1

## Leadership Values Agreement

Following is the ADHA Leadership Values Agreement that the 2010/11 Board of Trustees adopted that is an excellent document for your respective boards to discuss:

### ADHA Leadership Values Agreement

We will hold to our goals and utilize the strategic plan as our guiding document.

We will remember that although we are elected by the House of Delegates or our respective district delegates, our responsibility is to make decisions on behalf of the entire country.

We will cooperate and focus our energies on setting directions through strategic thinking as we lead the association.

We will be aware of how our decisions and actions affect others.

We will conduct ourselves professionally and respectfully at all times, to insure that we will share mutual respect and understanding for our different roles and responsibilities.

We will prepare for meetings by reviewing and clarifying all information prior to attending.

We will actively engage and participate in discussions prior to decision making.

We will assure that decision making is based on quality and factual information so that our decisions and programs have a timely impact for our membership.

We will be respectful of our resources by understanding the limits of personnel, money and time.

We will be respectfully open, direct and honest with our ideas and opinions; and we will respect and maintain the confidentiality of specific issues or situations.

We will agree or disagree on particular subjects without personalizing the issues.

We will support all decisions, policies and programs when implemented regardless of personal feelings.

We will sign the conflict of interest form and adhere to its policy.

We will voice our opinions to avoid silence being interpreted as acceptance or agreement.

We will encourage everyone to resolve potential conflict resulting from differences of opinion.

We will be respectful and listen to one another, we will not be defensive of our viewpoint, but will work toward consensus whenever possible.

We will strive to create an atmosphere of camaraderie and fellowship as we work together.

\_\_\_\_\_

Date \_\_\_\_\_

## **Conflict of Interest Policy**

A conflict of interest is defined by the Business Dictionary as a situation that has the potential to undermine the impartiality of a person because of the possibility of a clash between the person's self-interest and professional-interest or public-interest. Officers at the state and local level should consider incorporating a conflict of interest policy. Following is the ADHA Conflict of Interest Policy for reference:

### **ADHA CONFLICT OF INTEREST POLICY**

The American Dental Hygienists Association (ADHA) is a not-for-profit association which provides support, directly or indirectly, for a variety of activities in the areas of research, education, promotion, and advocacy. The integrity of such activities, as well as that of the Association generally, is dependent on the avoidance of conflicts of interests, or even the appearance of such conflicts, by the participants.

At the same time, ADHA recognizes that the elected and appointed leaders of ADHA, as well as others acting on the Association's behalf, also have significant professional, business and personal relationships. Therefore, ADHA has determined that the most appropriate manner in which to address actual, potential or apparent conflicts of interest is primarily through liberal disclosure of any financial or other interest which might be construed as resulting in such a conflict. This Policy should not be construed as creating a presumption of impropriety. Rather, it reflects ADHA's recognition of the many factors that can influence one's judgment and a desire to make as much information as possible available to other participants in ADHA-related matters.

Any individual involved in an ADHA activity or decision-making process shall have an obligation to disclose a significant financial interest in, or other relationship with, an entity having a commercial interest in the activity or outcome of the decision. A commercial interest may exist not only where the entity's products or services are under consideration by the Association, but also where the entity's products or services are in competition with those under consideration. By the disclosure of such interests, ADHA will be in a better position to determine whether the participant may have an interest in conflict with the interests of ADHA.

ADHA is primarily concerned with potential conflicts of interest involving those individuals participating directly in ADHA-related activities. Potential conflicts of interest also may arise, however, if an individual with whom the participant directly shares income (e.g., a spouse) has a financial interest in, or other relationship with, an entity having a commercial interest in the activity or matter under consideration.

Financial interests or relationships requiring disclosure include, but are not necessarily limited to, the following:

#### Employment

Any full- or part-time employment must be disclosed.

#### Consultancies

Consultant arrangements must be disclosed if (i) the consultation is current or proposed; or (ii) the consultation was performed, or payments were made for such consultation, within the prior two years.

### Ownership Interests

Any ownership interests (including stock options but excluding indirect investments through mutual funds and the like) in a company, the stock of which is not publicly traded, must be disclosed. If the company is publicly traded, ownership interests valued at \$1,000 or more must be disclosed. In addition, any other ownership interests in an entity having a commercial interest in an activity or matter under consideration by ADHA must be disclosed.

### Honoraria

Honoraria are reasonable payments for specific speeches, seminar presentations, or appearances. Disclosure of honoraria is required in the event the amount paid, or about to be paid, is equal to or greater than \$1,000 per year or \$2,500 over a three-year period.

### Research funding

Receipt of funds for conducting research must be disclosed. Moreover, research funding which varies according to research outcomes or which is not commensurate with the requisite effort is particularly relevant.

### Leadership Role in Other Organizations

Any leadership role (e.g., as a Board member, committee member, advisor) in another organization must be disclosed.

The nature of the required disclosure may vary according to the circumstances. In most instances, disclosure of the conflicting or potentially conflicting interest will itself suffice to protect the Association's interests. In other words, once such a conflict is fully disclosed to the relevant parties, they generally will be able to evaluate the possible influence of the disclosed interest. In relatively limited situations where such disclosure does not appear to deal with actual or potential problems, additional action, including denial of participation in the subject activity or consideration of the matter, may be necessary. It will be the responsibility of the appropriate ADHA leaders to interpret and apply the guidelines to fit the particular circumstances.

Integral to the implementation of the Conflict of Interest Policy is the ADHA Conflict of Interest Disclosure Form, a copy of which is attached, which shall be considered a part of the Conflict of Interest Policy and must be submitted by any individual desiring to participate in an ADHA activity. Disclosure Forms shall be kept on file by the ADHA staff for a period of two years, or 1 year after the conclusion of the activity or decision-making process, whichever is longer, unless otherwise determined by the Board.

In order to facilitate implementation of the Conflict of Interest Policy, the Board of Trustees, or their designee(s), shall determine when an individual engaged in, or about to engage in, an ADHA -related activity or other matter under consideration has an actual, potential, or apparent conflict of interest requiring some response by ADHA. Specifically, subject to the procedures set forth herein, the Board may require any action it deems appropriate, including, but not limited to, the following:

- (1) Disclosure of the interests to the other participants in the decision- or policy-making body (e.g., committee, editorial board, affiliated society).
- (2) Written and, in some cases, oral disclosure of the interest (e.g., to an

audience receiving the results of clinical research or at scientific or educational sessions).

- (3) Recusal from voting on a matter and limitation of the individual=s participation only to the provision of factual information of benefit to the group discussion.
- (4) Complete recusal from a portion of a meeting or from other consideration of the subject matter.
- (5) Replacement of the individual in the subject position or activity.

All participants in ADHA-related activities must comply with the ADHA Conflict of Interest Policy. Committee chairs, editors, etc., may be specifically designated by the Board to interpret and apply the Policy. Inasmuch as the Policy is stated in general terms, however, the appropriate ADHA leaders are expected to use their best judgment to interpret and apply the Policy to the particular circumstances presented before them.

**ADHA Conflict of Interest Disclosure Form**

**NAME:** \_\_\_\_\_

**ACTIVITY:** \_\_\_\_\_

**1. Employment**

Please list the individuals or entities for which you<sup>1</sup> are now or about to be employed, or for which you have been employed within the past three years.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**2. Consultancies**

Please list any individual or entity for which you are now providing, or are about to provide, consulting services, as well as any individual or entity for which you performed such services, or by which you were paid, during the past two years.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**3. Ownership Interests**

*With respect to each question, it includes you as well as anyone with whom you directly share income.*

Do you have any ownership interests (including stock options) in a company, the stock of which is not publicly traded?

No \_\_\_\_\_ Yes \_\_\_\_\_ Please List: \_\_\_\_\_  
\_\_\_\_\_

Do you have any ownership interests (including stock options but excluding indirect investments through mutual funds and the like) valued at \$1,000 or more in a publicly traded company?

o \_\_\_\_\_ Yes \_\_\_\_\_ Please List: \_\_\_\_\_  
\_\_\_\_\_

Do you have any other ownership interests in a commercial entity that reasonably may be anticipated to conflict with the interests of ADHA?

No \_\_\_\_\_ Yes \_\_\_\_\_ Please List:

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**4. Honoraria**

Have you been paid within the last three years, or do you expect to be paid, honoraria exceeding \$1,000 per year or \$2,500 over a three-year period?

No \_\_\_\_\_ Yes \_\_\_\_\_ Please List:

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**5. Research Funding**

Have you received any research funding within the past three years, or are you about to receive such funding?

No \_\_\_\_\_ Yes \_\_\_\_\_ Please List:

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**6. Leadership Role in Other Organizations**

Do you serve in a leadership capacity (e.g., Board member, committee member, advisor) for any other association, society, or foundation?

No \_\_\_\_\_ Yes \_\_\_\_\_ Please List:

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**PLEASE RETURN to ADHA CENTRAL OFFICE**

**I represent that the information reported above is accurate. I understand that, where appropriate, this information may be disclosed publicly. I further understand that failure to complete this Disclosure Form when so requested will automatically disqualify me from participating in the affected activity.**

Submitted by: \_\_\_\_\_

Date: \_\_\_\_\_

## **ADHA Rules of Conduct**

Following are the Rules of Conduct for ADHA Board of Trustees:

As a member of the Board of Trustees of the American Dental Hygienists Association, I agree to support and be bound by the following principles to assure effective and ethical decision-making and governance:

I will be deliberate in my responsibility to ADHA by preparing for meetings and decision-making (e.g. by studying all materials in advance). I will consider the need for and request any additional information in advance of meetings.

I will base my decisions on all available facts in each situation, taking into consideration the views of my fellow members.

I will make decisions in the best interest of ADHA as a whole, and will strive to keep personal bias or the views of special interests at a minimum.

I will accept, implement and support all decisions of the body, even those that I did not initially support or those that were made in my absence.

I will work to provide an environment conducive to comprehensive analysis of issues, and assessment of benefits and risks of action or inaction, in an open dialogue between members and the executive director.

I will not speak or act for ADHA unless specifically authorized to do so. I will not present opinions about ADHA business unless those opinions have been approved in advance by ADHA or unless those opinions are clearly expressed as personal opinions and not necessarily the views of ADHA.

I will not discuss matters deemed confidential by the board meetings without the express permission of the President.

I will abide by ADHA's policies on conflicts of interest and will strive to avoid even the appearance of such conflicts.

I hereby acknowledge that I have received a copy of the Rules of Conduct. I understand that it describes the general rules by which I will conduct myself as a volunteer of the ADHA and that I am responsible for familiarizing myself with the statements it contains.

Signature: \_\_\_\_\_  
Print name: \_\_\_\_\_  
Date: \_\_\_\_\_

## **Best Practices**

The term “best practices” is used quite often in the business world as well as in association management. As Wiki defines it:

A best practice is a technique, method, process, activity, incentive, or reward which conventional wisdom regards as more effective at delivering a particular outcome than any other technique, method, process, etc. when applied to a particular condition or circumstance.

The idea is that with proper processes, checks, and testing, a desired outcome can be delivered with fewer problems and unforeseen complications. Best practices can also be defined as the most efficient (least amount of effort) and effective (best results) way of accomplishing a task, based on repeatable procedures that have proven themselves over time for large numbers of people.

A given best practice is only applicable to particular condition or circumstance and may have to be modified or adapted for similar circumstances. In addition, a “best” practice can evolve to become better as improvements are discovered.

We hope that this manual will show you many best practices!

# **Strategic Planning**

## **Overview**

Apply the same tactics for developing your organization’s mission to the process of strategic planning. Again, ask the following questions:

- Where are we?
- What do we want to achieve?
- How do we get there?

The first step in strategic planning is to conduct a situational analysis. This allows the leaders to make decisions based upon what they know rather than what they believe. Analysis is the critical starting point of strategic thinking.

An organizational audit helps members understand the association’s strengths and weaknesses. An environmental analysis helps members perceive opportunities and threats that are outside the association and thus not under the association’s control. However, they may directly affect the ability of the association to achieve its objectives and should be considered as part of the planning process.

It is important to begin the process of analysis before the planning session. Participants should identify the strengths and weaknesses of the existing strategic plan. Then prioritize items from highest to lowest value in each area.

Once the analysis is completed, the next step is to develop goals. Goals are broadly defined central aims of the group. They are usually long-term targets and are made known to the public. Objectives, on the other hand, are more specific and are associated with actions within each goal area. An objective is a clear, concise and measurable statement of what is to be achieved.

Strategic planning is not a magical process. Nothing will happen unless there is follow-up to see that actions are taken. To do so, you need to set objectives. Objectives serve as the basis for

developing the annual budget.

The key to achieving objectives is to develop action plans. Action plans are a series of steps to meet the objectives -- how to proceed. An action plan designates a timetable, the persons responsible for completing the plan, the finances, and other resources needed. It also provides a mechanism to continually evaluate progress, and it may suggest the need to incorporate alternative plans, if necessary.

Strategic planning encourages leaders to develop a shared vision of the future and to communicate core values and strategies. A set of specific and quantifiable measures should be developed that identify success year after year. Before you begin, you need to reach consensus about the role of the organization.

Once you have articulated core values, you need to establish quantifiable outcome measures of success, otherwise known as metrics. This step is necessary to ensure that you are continually moving toward your vision. Specific metrics should be set to measure your progress. A process should be established to review the performance and to report where there is significant difference between actual and planned performance.

Strategic planning can be a monumental task. You may wish to tie the strategic planning session to an annual board meeting. The board will most likely require the assistance of an experienced facilitator to streamline the planning process. A facilitator should be someone who is familiar with the organization's structure, mission, and processes. The primary function of the facilitator is to enhance the group's ability to work together.

In addition to a planning facilitator, a strategic planning committee should be appointed. The role of the committee is to organize the ideas shared during the planning session into a workable plan. The committee should work closely with the facilitator to ensure that the plan objectives are reflective of the board's intent and that they have measurable outcomes.

### **What's a Mega Issue? - How to Have a Mega Issue Discussion**

The national House of Delegates engages in a mega issue discussion at Annual Session. Many districts and states are starting to utilize mega issue discussions to facilitate their strategic planning as well.

Mega issues are: strategic planning issues requiring more dialogue, hot emerging issues/controversial issues identified by leadership/boards, or task force/committee recommendations. Also, they are:

- Frequently complex, not easily resolved, sometimes highly emotional
- Require broad-based input and buy-in
- Challenge participants to get out of the box
- Require well thought-out questions
- Should lead to practical consensus (in some or all areas). Note: it's important to talk about where there is agreement, disagreement or "hung jury" and why.

A mega issue typically has four leadership roles:

- Table facilitator: assures that each person who wants to speak is heard within time available, moves the discussion, and is pre-assigned this role.

- Timekeeper: keeps group aware of the time left. Monitors report-outs and signals time remaining to person talking.
- Recorder: writes groups' output using the speakers' words. Asks people to restate long ideas briefly.
- Reporter: delivers report to large group in time allotted.

The discussion should be a forum for open dialogue that asks:

- What do we know about this issue?
- How do we know?
- What are our choices? The possibilities?
- What are the pros/cons? Or what are the barriers/opportunities?

Benefits and Positive Outcomes of a mega issue discussion are:

- Everyone has given input, even those who won't go to a microphone
- Being part of the decision-making process causes members to support the outcome

District Trustees provide a great resource for the facilitation of a mega issue discussion. Following is an example of a Trustee who facilitated a mega issue discussion on branding. Their three questions were:

1. How can incorporating the brand help the state associations?
2. What can ADHA do to assist the state with the process of incorporating the brand? I.e. resources, key messages, etc.?
3. What is the state association's role in the process?

The Trustee provided background information to be reviewed prior to the mega issues discussion. They had four tables of 8-10 people and were encouraged to mix it up. Each table had their own recorder who typed all the information into a computer that was projected on a screen for all to review to make sure that their thoughts and ideas had been captured. At the end of the summary, the Trustee reported that she would share the information with ADHA central office.

Prior to the meeting the Trustee appointed a representative from each state to be a table facilitator (note: these people were selected based on having participated in a mega issues discussion at ADHA so they were familiar with the process). Each question had a set discussion time limit to keep within the time framework. They pretty much incorporated the leadership roles described above. At the end, the Trustee summarized the discussion.

Mega issue discussions provide great insight for strategic planning in an inclusive environment.

# Financial Issues

## Overview

As a professional association, a constituent or component exists to promote the welfare of its members and the welfare of the public that it serves. (In doing so, the primary focus is on the profession.) To fulfill the duties of your constituent or component, you will need to attend to financial and finance-related issues that uniquely impact the professional association as well as issues which are generally common to business.

Following are some financial and finance-related issues that you are likely to encounter general advice provided. Keep in mind that it is impossible to identify all of the issues that a constituent or component may face, and because circumstances invariably differ, it is also impossible to provide all of the answers. There is no substitute for obtaining professional advice!

## Financial Policies

For most constituents and components, financial policies are set by one of three groups, and in some cases, especially with constituents; policies are developed at all three levels. The house of delegates (HOD) and/or the board of trustees (BOT) will set the amount of dues that each member pays, investments, level of reserves to be maintained, special funds for specific use, reimbursement guidelines for members and guidelines for who signs checks. The other group that's involved in financial policy is the people responsible for making day-to-day operational decisions such as where to maintain bank accounts, negotiating meeting space, and office space and staffing responsibilities, if applicable. To ensure the effectiveness of financial policies, it is crucial that the authority and responsibility for the implementation and maintenance of the financial operation and record keeping is clearly defined as to who is responsible for carrying out these functions; i.e., what are the roles of the president, president-elect, treasurer, and staff if applicable.

## Financial Statements and Methods of Accounting

There are two methods of accounting, the cash and accrual methods.

Cash basis: (cash receipts and disbursements) is the simplest method of accounting. Income is reported in the year that the cash receipt is physically received and deposited into the bank. Expenses are taken in the year that the expense is actually paid.

Accrual basis: is generally accepted method of accounting and is the more accurate method of accounting that should be used. With the accrual method, income is recorded when you have the right to receive the money. Thus, the right to receive the money controls and not the actual receipt of payment. Expenses are taken in the year incurred. Thus, when you incur the expense controls and not when you actually pay for the item. Under the accrual method your association will have accounts receivable and accounts payable on its books.

Constituent and component associations should compile financial statements on a monthly basis, and if not monthly, at least quarterly.

There are three basic financial statements that should be prepared on a monthly basis if possible:

- Statement of Financial Position (balance sheet)
- Statement of Activities (income statement)
- Statement of Cash Flows (cash flows statement)

If budgets are used, then the Statement of Activities should include a comparison of actual results to budget.

### Budgets

A budget can be described as a summary of intended expenditures along with a projection of revenues to meet them. A budget is used as the basis for planning and controlling cost in accordance with the guidelines set by the governing body. In most cases, the budget is approved by the board of directors or the house of delegates.

Effective budgeting starts with the financial planning for the upcoming year(s). Although past performance will be useful in planning some aspects of your budget, relying solely on historical data can lead to incorrect projections. Relying totally on historical data can also lead to incorrect assumptions about the future. Therefore, when preparing your budgets, zero-based budgeting should be applied. Zero-based budgeting is a process by which each expense and revenue for each activity or function is justified every time a new budget is prepared.

Budgets should be realistically conservative, but not so conservative that they hinder the prospect of implementing new programs and functions or hinder the growth of existing programs and functions.

When preparing a budget, make sure that expenses are matched with revenues earned in the same period; i.e., dues earned for the period January through December should be matched with expenses incurred from January through December (see accrual basis accounting).

Once the budget has been approved or adopted, it should be monitored preferably on a monthly basis, and not less than quarterly. Budget variance should be analyzed and appropriate action should be taken if necessary.

### Hands on Budgeting

Once you have developed your association's strategic plan, you can focus on developing the budget. The budget is one of the basic planning tools of your constituent or component and should be directly linked to your strategic plan.

The treasurer, in conjunction with a budgeting/finance committee, should be responsible for developing a budget that incorporates the strategic plan. The budgeting or finance committee should consist of the president, treasurer and members with financial planning or budgeting experience.

Begin by identifying every program or activity for the coming year as it is outlined in your strategic plan. Some examples of constituent and component programs might be:

- Annual Meeting
- Monthly business meetings
- Networking events
- Continuing education seminars
- Membership recruitment initiatives
- Membership retention/benefits
- Board/committee meetings
- Legislative activities
- Communications/newsletters
- Community outreach programs

Once each program has been identified, itemize the expenses you will incur to conduct the program. In addition, if the program generates revenue, include the projected revenue separately from the expenses.

Create a budget page for each strategic action plan that has financial impact. The budget page should include the project's description, time line, and expense/revenue.

By preparing this type of budget for each program, the members can easily see which programs produce revenue, which programs break even, and which ones do not produce sufficient income to cover expenses. It will also more clearly identify the strategic plan programs that have financial impact on the association.

Once the budget for each individual program is prepared, combine all of the programs along with the overhead into one complete budget. When the budget has been prepared, it should be shared with appropriate members, such as the board or as is defined in your organization's policy. Individual program budget details should be given to the individual or group responsible for implementing the program. Members should be provided with access to the budget. Access can be provided during the association's annual meeting or by request through a board member.

### Federal Tax Identification Number

A question commonly asked by constituents and components is "Can I use ADHA's tax identification number?" The answer is no.

Constituents and components are not a part of ADHA in a tax sense. Therefore, each constituent and/or component must have its own tax identification number.

A federal tax identification number (otherwise known as employer identification number) is used on all federal and some state filings and is required to conduct business such as the opening of bank accounts. Virtually all organizations (for-profit and not-for-profit) should have such a number. If your constituent or component does not already have such a number, you should apply for one with the appropriate regional Internal Revenue Service office using IRS form SS-4. All IRS forms may be found at [www.irs.gov](http://www.irs.gov).

### Tax-Exempt Status

There are many different types of tax-exempt organizations. Although the Internal Revenue Code recognizes numerous types of tax-exempt organizations, constituents and components are considered a "business league" under Internal Revenue Code 501 (c) (6). ADHA is a "business league" for tax purposes.

As a business league, the major benefit of tax-exempt status is that constituents and components do not have to pay federal tax on their excess of income over expenses ("profits") as it relates to the purpose and function of the organization. However, unrelated business income may be taxable to the extent that revenues exceed expenses (see Unrelated Business Income topic).

In order to be recognized as a not-for-profit under Internal Revenue Code 501 (c) (6), constituents and components should apply for exempt status using IRS form 1024 (please see the following topic on Group Tax Exemption). The application can be somewhat complicated, so it is recommended that you seek legal advice before filing it.

A Constituent and Component Organization should not take any action that would prevent it from being eligible for exemption from the payment of federal income taxes as a tax-exempt organization within the meaning of section 501(c)(6) of the Internal Revenue Code.

Without a tax exempt status, constituents and components are unable to file the new IRS Form 990 or 990 EZ, which is required by federal law. Please see the following section related to the filing of the 990.

### Group Tax Exemption Guidelines

For many associations their chapters, affiliates, and similar regional, state, and local organizations of tax-exempt associations may obtain a "group exemption," a determination from the Internal Revenue Service (IRS) that all such affiliated organizations are tax-exempt. This avoids the need for each of the organizations to apply for exemption individually. A group exemption letter has the same effect as an individual exemption letter except that it applies to more than one organization.

If constituents were going to file for group tax exemption, the process is relatively simple in that they only need to submit a group exemption application letter to the IRS. The constituent also must annually file a list of its qualifying tax-exempt components. Please note, as of January 2011, a user fee of \$3,000 is required with all requests for group exemption.

In this scenario, the constituent essentially attests in a listing with the IRS that its affiliates (components) qualify as tax-exempt organizations, which in turn relieves the IRS of its obligation to independently evaluate the tax-exempt status of each component. The principal advantage of group exemptions is that each component covered by a group exemption letter, called a "subordinate" organization, is not obligated to go through the process of filing for tax exempt status on their own. The constituent would submit a letter to the IRS on behalf of itself and its components that would include items such as:

- Information verifying the existence of the required relationship
- A sample copy of a uniform governing instrument (such as articles of association/bylaws) adopted by the subordinates
- Detailed description of the purposes and activities of the components including the sources of revenue and expense
- An affirmation by a principal officer (i.e.: the President or Treasurer) that, to the best of the officer's knowledge, the purposes and activities of the components are as described
- A statement that each component to be included in the group exemption letter has furnished written authorization to the constituent
- A list of components to be included in the group exemption letter to which the IRS has issued an outstanding ruling or determination letter relating to exemption
- A list of the names, mailing addresses (including zip codes), actual addresses (if different), and employer identification numbers of components to be included in the group exemption letter

The rules for applying for a group exemption are set forth in Rev. Proc. 80-27, 1980-1 C.B. 677. They can also be found at [www.irs.gov/eo](http://www.irs.gov/eo), Publication 557, Tax-Exempt Status for Your Organization, or by contacting the IRS directly.

Upon receipt of an application Form 1023 or 1024 and a request for group exemption, the IRS first determines whether the constituent and its components qualify for tax exemption. Once the IRS grants the exemption, the constituent is responsible for (1) ensuring that its current components continue to qualify to be exempt; (2) verifying that any new components are exempt; and (3) updating the IRS on an annual basis of new components, components no

longer to be included, and components that have changed their name or address. Information that must be provided in the annual update to the IRS includes the following:

- Information about changes in purposes, character, or method of operation of subordinates included in the group exemption letter.
- Lists of: components that have changed their names or addresses; components no longer included; and components that have been added. Each list must show the names, mailing address (including zip code), and employer identification numbers of the components.
- The same information about new components that was required in the initial request.

The group exemption letter does NOT change the filing requirements for exempt organizations. The constituent and the components MUST file Forms 990 (or 990-EZ). However, while the constituent must file its own separate return they may also file a group return on behalf of some or all of its components.

For many components, filing for tax exempt status is a lengthy and expensive process that they are unable to do. Therefore, ADHA recommends that constituents file for group exemption for those components that are unable to complete the process on their own. We hope that this recommendation streamlines and facilitates the components' filling of IRS Form 990 or 990 EZ and ensures that all ADHA entities are in compliance with state and federal law.

#### 990 Filing Requirements

Generally, tax-exempt organizations must file an annual information return. Tax-exempt organizations that have annual gross receipts not normally in excess of \$25,000 are not required to file the annual information return, but are required to file an annual electronic notice (e-Postcard) Form 990-N.

*Tax-exempt organizations, other than private foundations, must file Form 990, Return of Organization Exempt from Income Tax, or Form 990-EZ, Short Form Return of Organization Exempt from Income Tax. The Form 990-EZ is designed for use by small tax-exempt organizations and nonexempt charitable trusts. An organization may file Form 990-EZ, instead of Form 990, only if it satisfies thresholds relating to its gross receipts during the year and its total assets (as shown in the balance sheet of Form 990-EZ) at the end of the year. If your constituent or component fails to meet either of these conditions, you cannot file Form 990-EZ. Instead you must file Form 990.*

Form 990, Form 990-EZ, or Form 990-PF must be filed by the 15th day of the 5th month after the end of your organization's accounting period. The Form 990 and Form 990-EZ instructions and the Form 990-PF instructions indicate the Service Center to which they must be sent.

A tax-exempt organization that fails to file a required return is subject to a penalty of \$20 a day for each day the failure continues. The same penalty will apply if the organization fails to give correct and complete information or required information on its return. The maximum penalty for any one return is the lesser of \$10,000 or 5 percent of the organization's gross receipts for the year. If the organization has gross receipts in excess of \$1,000,000, the penalties are increased to \$100 per day with a maximum penalty of \$50,000.

## Unrelated Business Income

Even though an organization is recognized as tax exempt, it still may be liable for tax on its unrelated business income. Unrelated business taxable income (UBTI) is income from a trade or business regularly carried on by an exempt organization that is not substantially related to the organization's exempt purpose. The following common income items are excluded from unrelated business income:

- Dividends
- Interest
- Royalties
- Rents (only if no mortgage)
- Tradeshow exhibit fees

The revenue that most organizations must pay tax on is derived from profits from the sale of mailing lists and the sale of advertising in a periodical it publishes. The gross advertising income is then reduced by the related expenses to come up with a net income amount that will be taxed.

Another item of concern is the income derived from "sponsorships" of events. These sponsorships will not be taxed, provided that the sponsor does not expect any substantial return other than the use or acknowledgment of the sponsor's name, logo, or product lines. The sponsorship must not include messages that contain qualitative or comparative language; price information; an endorsement; or an inducement to purchase, sell, or use the sponsor's products or services. If it fails this test, then the sponsorship income would be taxable as UBTI.

In addition to paying federal income tax on any UBTI, you must also check with your applicable state regulations, as most states also impose a tax on UBTI.

An exempt organization that has \$1,000 or more gross income from an unrelated business must file Form 990-T, *Exempt Organization Business Income Tax Return*. The obligation to file Form 990-T is in addition to the obligation to file the annual information return. Tax-exempt organizations must make quarterly payments of estimated tax on unrelated business income. An organization must make estimated tax payments if it expects its tax for the year to be \$500 or more. The Form 990-T of a tax-exempt organization must be filed by the 15th day of the 5th month after the tax year ends. For additional information, see the Form 990-T instructions or Publication 598, *Tax on Unrelated Business Income of Exempt Organizations*.

For those constituents and components who have staff, every employer, including a tax-exempt organization, who pays wages to employees is responsible for withholding, depositing, paying, and reporting federal income tax, social security taxes (FICA), and federal unemployment tax (FUTA) for such wage payments, unless that employer is specifically excepted by statute from such requirements or if the taxes are clearly inapplicable.

## Income

Member dues are collected by ADHA. Constituents and Components are authorized to establish dues rates and raise funds by methods other than dues, provided such activities are consistent with ADHA's bylaws, policies, and rules and comply with all federal, state, and local laws.

## Internal Controls

Internal controls can briefly be summarized as a plan to protect the association's assets, verify the accuracy and reliability of its financial data, and promote operational efficiency under a set

of guidelines adopted by the association. It must be understood that the effectiveness of internal controls can sometimes be limited by the resources available to implement them. The following is a list of some internal control procedures that could help strengthen your association financially.

1. Segregation of Duties

- No one person should control all aspects of a transaction.
- All checks should require two signatures.
- A non-check signer should reconcile the bank statement.
- The person making bank deposits should not write checks.
- The person making the expenditure should NOT approve it or sign the check. A second person should approve and sign the applicable payment.

2. A separate bank account should be opened in the name of the organization.

3. Payments should be made based only upon original receipts as backup. Copies of receipts or copies of credit card statements should not be used. Credit card charge tickets must be provided as support. All supporting documents should be marked in ink that they have been paid to avoid duplicate payment of the same original invoice.

4. Checks received should be immediately endorsed with the bank deposit stamp and bank deposits should be made as soon as possible. Physical cash should be deposited the same day it is received.

5. Bank reconciliations should be done monthly, preferably by a person who is not involved in the bank deposit or cash disbursement functions. If this is not possible, a second person should review and initial the bank reconciliation.

6. Financial statements with a comparison to budget should be sent to the board of directors on a quarterly basis.

7. Record retention schedules should be approved and followed.

Debts and Liabilities

Each Constituent and Component Organization is solely responsible for its own debts and liabilities, and for fulfilling all requirements imposed by government authorities, including reporting and tax requirements.

# Meeting Facilitation & Parliamentary Procedure

For an association to accomplish its strategic plan in a timely manner, it will need to identify and distribute responsibilities among the members of the association.

## Governance Structure

- ❖ A Board – which may consist of a president, immediate past president, vice president, treasurer, membership chair, secretary, and possibly committee chairs.
- ❖ Committees – which may consist of members with expertise in the area of focus for the committee. Some common committees are membership, finance, legislative, and continuing education. Committees should report to the board.
- ❖ Ad hoc committees or task forces – are typically developed for a specific period of time to address a unique task. Ad hoc committees and/or task forces may report to a standing committee or directly to the board.

Each of these groups will need to conduct regular meetings in order to successfully complete its mission.

## Effective Meetings

- A written agenda - The agenda lists the topics to be discussed during the meeting. Agendas should be prioritized in order of importance. This will ensure that, given potential time constraints, the most important items will be addressed. (See sample agenda.)
- Established rules - Rules will affect how much gets accomplished during the meeting. Many groups choose to make decisions by consensus, reaching a unanimous decision through discussion and compromise. When trying to achieve consensus, the chair is responsible for ensuring that there is no disagreement. If there is a large group of meeting participants, you will probably get more accomplished by using parliamentary procedure, which is highlighted below.
- A fair chairperson - The chair guides the discussion; pays attention to the flow of the meeting; ensures that majority opinions are adopted and minority opinions are protected; that business is accomplished; and that goals are achieved.
- Meeting documentation – A secretary should be appointed to document the important aspects of the meeting. Documentation should be in the form of minutes that follow the agenda. In addition to minutes, some constituents and components may summarize the meeting in the form of a report for historical files. (See sample minutes.)

Utilize the latest technology for your meetings! Conference calls, web-based meetings, etc. Time is precious for volunteers so utilizing your time and means effectively is essential.

## Parliamentary Procedure

Parliamentary procedure is one method for a group to use in decision making. However, it's not mandatory and many organizations are moving towards open discussion with consensus

building. The parliamentary authority used in ADHA is the current edition of *Roberts' Rules of Order, Newly Revised*.

Listed below are the basic criteria for using parliamentary procedure when conducting business. Note that the capitalized words are considered the official terminology when using parliamentary procedure.

### General Basics

1. Rise to a microphone to be recognized to speak.
2. The chair is addressed as Madame or Mr. Speaker or Chairman.
3. State your name.
4. State your position on the issue and then give your JUSTIFICATION or reason.

Business is generally brought to the floor with a MAIN MOTION. In ADHA, resolutions are main motions.

There are six basic steps in a motion:

1. The motion is made. ("I MOVE that.." or "Resolve that...")
2. A member SECONDS the motion.
3. The Chair STATES the motion and opens discussion.
4. After discussion, the Chair PUTS the MOTION to a VOTE. (Restates the motion in current form.)
5. The Chair takes the vote ("Those in favor say AYE or raise your hands." "Those opposed say NO or raise your hands.")
6. The Chair announces the results of the vote.

Discussion of the motion will center on the merits of the question, the disposition of the motion (see below), and may include proposed amendments to the motion.

### Basic Options in the Disposition of a Resolution

1. POSTPONE INDEFINITELY ("I move to postpone indefinitely resolution x..")
  - DEBATE can be made on the merits of the resolution.
  - ADOPTION of the motion has the effect of suppressing the question throughout the current session. It is an indirect rejection of a motion when the House does not want outright rejection of the idea.
2. AMEND ("I speak in favor but I move to amend by...")
  - INSERTION of a word or phrase, or if at the end of the motion it is by ADDITION.
  - STRIKING a word or phrase.
  - STRIKING a word or phrase and INSERTING a different word or phrase in its place.
  - SUBSTITUTION for the entire resolution if the changes are numerous and complex.

Amendments must be seconded and must be GERMANE (closely related or having bearing on the motion). Discussion focuses **ONLY** on the amendment to the motion and not the entire question. It is also possible to "amend the amendment." Then one has a primary and secondary amendment. The secondary amendment must be germane or relate to the primary amendment.

3. ADOPT as is ("I speak in favor of the resolution because...")
4. REJECT as is ("I speak against the resolution because...")
5. REFER or COMMIT ("I move to refer...to...")

If the House believes that further investigation or work is necessary before taking action on an issue, the correct procedure is to REFER the resolution.

#### Example of a Motion and Possible Amendments

It is moved and seconded that dental hygienists in the office wear navy slacks, a blouse, soft tie, and a lab jacket while working with patients.

1. MOVE to AMEND by INSERTION, after "navy slacks", insert "or skirt" to read:  
That, dental hygienists in the office wear navy slacks or skirt, a blouse, soft tie, and a lab jacket while working with patients.
2. MOVE to AMEND by STRIKING "soft tie" to read:  
That, dental hygienists in the office wear navy slacks, a blouse, and a lab jacket while working with patients.
3. MOVE to AMEND by STRIKING "jacket" and INSERTING "coat" to read:  
That, dental hygienists in the office wear navy slacks, a blouse, soft tie, and a lab coat while working with patients.
4. MOVE to AMEND by INSERTING "yellow shirt-type" in front of "blouse" to read:  
That, dental hygienists in the office wear navy slacks, a yellow shirt-type blouse, soft tie, and a lab jacket while working with patients. (PRIMARY AMENDMENT)

MOVE to AMEND by STRIKING "yellow" to read:  
That, dental hygienists in the office wear navy slacks, a shirt-type blouse, soft tie, and a lab jacket while working with patients. (SECONDARY AMENDMENT)

The secondary amendment is in order and is appropriate while the primary or first amendment is being discussed since it is a part of the primary amendment. It is not appropriate or in order to move to amend another part of the motion while "yellow, shirt-type" is being discussed.

5. MOVE to AMEND by SUBSTITUTING:  
That, the dental hygienists in the office be allowed to wear whatever they wish while working with patients.

For additional assistance with parliamentary procedure, consult your parliamentarian.

## Sample Meeting Agenda

**Agenda**  
**Committee Name**  
**Date**  
**Location**

		Time	Outcome
1. Call to Order		8:00a	
2. Welcome and Introductions		8:10a	
3. Announcements		8:20a	
4. Additions to the Agenda		8:30a	
5. Approval of the Agenda		8:40a	
6. Review of the Previous Minutes/Report	Exhibit A	9:00a	Approve minutes
7. Review of Association's Strategic Plan	Exhibit B	10:00a	Develop Strategic Plan
8. Committee Initiative/Program 1	Exhibit C	11:30a	Approval
LUNCH BREAK		12:30-2:00p	
9. Committee Initiative/Program 2	Exhibit D	2:00p	Brainstorm
10. Committee Initiative/Program 3	Exhibit E	3:00p	Approval
11. Unfinished Business		4:00p	
12. New Business		4:30p	
13. Adjournment		5:00p	

## Sample Meeting Minutes

**Final Minutes**  
**Committee Name**  
**Date**  
**Location**

**Members:** Names

**1. Call to Order**

The Committee Name was called to order by (chair), at (time) on (date) at (location).

**2. Welcome and Introductions**

The committee chair welcomed and introduced the committee members.

**3. Announcements**

The committee chair announced (announcements).

**4. Additional Agenda Items**

No additional agenda items were noted. Or an additional agenda item was added (location on agenda).

**5. Approval of Agenda**

The agenda was reviewed and adopted.

**6. Review of Committee Minutes/Annual Report**

The committee minutes from the (date) meeting were reviewed. No revisions were noted. Or the following revisions were noted:

**7. Review of Association's Strategic Plan**

The committee reviewed the association's strategic plan.

**8. Committee Initiative/Program 1**

The committee discussed (initiative/program 1). (If appropriate, include any formal recommendations).

**9. Committee Initiative/Program 2**

The committee discussed (initiative/program 2). (If appropriate, include any formal recommendations).

**10. Committee Initiative/Program 3**

The committee discussed (initiative/program 3). (If appropriate, include any formal recommendations).

**11. Unfinished Business**

There was no unfinished business.

**12. New Business**

There was no new business.

**13. Adjournment**

The Committee Name meeting was adjourned by the chair at (time), (date).

# Organizing Volunteers

Your volunteers are the heart of your project. From the leadership that directs the mission of the association to the member who may simply refer a friend to the association, every member plays a key role. It is important to have their support, gain their commitment, and give them the tools and ideas they need to be successful.

Too often, we rely on a few hard-working individuals to carry the load. To avoid volunteer burnout, it is important to continually expand your volunteer base and have plenty of opportunities for them to contribute in short-term ways.

The biggest reason why people don't volunteer is because no one asks them to. Put yourself in the shoes of a member who wants to get involved. How easy is it to volunteer? How do you go about it?

Collect a profile sheet from each new member. Request information about:

- Reasons for Joining
- Personal Skills
- Other Membership Affiliations
- Recreational Activities
- Leadership Positions Held
- Number of years in the industry
- Employment setting

How do you transition new members into active committed members? *A typical transition program begins with recruitment, followed by orientation; then involvement; and finally a renewal of commitment.*

Highlighted below are a few tips for developing a strong volunteer base:

- *Include new and veteran members on your committee.* This brings new ideas together with the continuity of past experience. Involve student members while they are still in school and match them with long time members of the association.
- *Involve the general membership.* Every member should play a part! Invite non-committee members to serve as volunteers during phone-a-thons, mail campaigns, and other functions.
- *Make it fun and easy.* Volunteering should be a fun experience. Divide big projects into step-by-step tasks that are easy to accomplish. Be flexible and work projects into the volunteer's schedules.
- *Train the volunteers.* Outline their responsibilities and show them where they can turn for help.
- *Delegate effectively.* Give deadlines for the completion of each step in the project's development. Monitor the process at each deadline and offer additional assistance if needed. Offer suggestions, but let the volunteers add their input.
- *Recognize their hard work* so that they will continue to participate. Provide volunteer appreciation functions, certificates of recognition, or volunteer awards.

All constituents and components are encouraged to create a task list for each major project conducted by the association, such as recruitment campaigns, continuing education functions, annual meetings, and student programs. A task list would include a description of the task, deadline, committee/person responsible for completing the task, and a status. The task list would include all aspects of successfully planning, conducting, and evaluating the project.

A preliminary task list for volunteers for a continuing education program could include the following:

- Identify speakers
- Obtain mailing list
- Obtain meeting space
- Obtain sponsorship support (if necessary)
- Conduct mailing
- Schedule food/beverage
- Identify meeting registration volunteers
- Send thank you notes to speakers (post meeting)

Your association's program task lists will be more detailed depending on the size of the event/initiative. A good time to create such a list would be immediately following the activity while it is still fresh in your mind. By creating task lists for your association's events, you can more easily divide up responsibilities. Volunteers are more willing to give their time if they know what is expected of them and what their deadline is.

## **Branding**

Enhancing ADHA's image is one of the most important things we can do to ensure our future success. At any given moment, many organizations and messages are competing with us for consumers' attention. Our image, or brand, can help consumers quickly cut through this clutter and make a critical choice – to listen to the ADHA rather than someone else.

We must have a strong brand to succeed in achieving our mission. In 2007 we launched our new brand, our new philosophy and incorporated branding as a primary goal in our strategic plan.

Our brand goal states that "ADHA will be the recognized community and resource for dental hygiene". The primary objective in this goal is to strengthen state and local understanding and utilization of the brand and the secondary objective is to raise awareness of the dental hygiene profession and ADHA.

### **Logo Guidelines**

In today's business environment, it's increasingly difficult for an organization to be noticed and remembered. The clutter, volume and visual overkill of competing messages are overwhelming. As a result, more and more businesses are concentrating on developing a uniform, easily recognized "master brand" identity to communicate who they are to the public. ADHA is committed to developing communications strategies that strengthen our image and brand identity in the marketplace. A strong organizational identity is vital, because that's what the public recognizes and it sustains their loyalty.

ADHA has the significant challenge of creating a uniform brand in a tri-partite structure though. For example, if a consumer is looking at a state Dental Hygiene Association website ~ will they

necessarily understand that the state organization is part of the national organization? Staff at central office regularly receives calls from potential members expressing their confusion.

So what can we do to rectify this situation?

- Co-brand (ADHA, constituent and component logos) all mailings, emails, the website, etc.
- Use the new brand logos developed for the states (and we can customize these for components as well.)

ADHA's logo is a trademark and the property of ADHA. However, ADHA grants license to constituents and components to use the ADHA logo in a co-branded or newly branded format.

Members in good standing are authorized to use the "Proud Member" ADHA logo for the purpose of identifying their membership in ADHA. The Proud Member ADHA logo may not be used in any manner to imply that a member is in any way an agent of ADHA or that ADHA in any way warrants, approves or endorses any product or service provided by the member.

The Proud Member ADHA logo can be used on member's business cards, letterhead, promotional materials, and personal web sites.

Additional branding resources may be found in the Member's Only side of the website under Member Resources.

## **Membership Recruitment**

### **How to Implement a Campaign**

The key to an effective membership campaign is the Membership Chair (or campaign chair). The chair is responsible for ensuring that all aspects of the membership campaign are completed. This person should be someone who can delegate, who is motivational, and who can draw upon the various skills of the membership committee.

The membership committee should consist of active members who are avid supporters of the association. They should be skilled listeners, persuasive communicators, knowledgeable about the association, and respected by their colleagues. Once the membership committee is in place, it should identify additional members to serve as campaign volunteers.

There are several key components in planning a membership campaign. Listed below are recommended steps.

1. Outline your campaign goals and objectives.
2. Develop a time line.
3. Identify prospective members.
4. Determine how components and the constituent should work together.
5. Determine your marketing approach. (*One-on-one, direct mail, on-site*)
6. Identify volunteers.
7. Assign responsibilities.
8. Implement campaign.
9. Monitor progress.
10. Welcome new members.

The first step is to outline your campaign goals and objectives. Goals tend to be more general in nature. An example of a goal might be "Promote membership and participation in the association." Goals should be challenging but not unrealistic. Objectives are more specific actions. Examples of action plans are "Contact each prospective member at least three times."

Next you should develop a time line for the campaign. The time line may consist of two parts: 1) a calendar and 2) a daily or weekly task list. The calendar provides an overview of the campaign from beginning to end. Examples of what could be included on a campaign calendar are: August - hold campaign kickoff and volunteer orientation; September - conduct direct mail effort; October - follow up with non-responses and hold progress meeting. The daily or weekly task list should clearly identify the task, the volunteer responsible for completing the task, target completion dates, and task status. The membership committee should be responsible for monitoring progress as it relates to the task list.

The next step is to identify your prospective members. Gather referrals from current members for a member-get-a-member campaign. Contact non-renewed members or graduates. Include nonmembers who have attended local meetings, study groups, or CE offerings. Or contact the Division of Member Services for prospects identified in your area.

Ensure that the component and constituent implement campaigns with the same goals. Provide each other with the campaign goals and objectives; membership committee contact information; and a schedule. With the constituents and components working together, the message of membership will be reinforced by one another. You may also want to schedule a combined recruitment effort as part of your annual meeting.

The next step is to determine your marketing approach. The personal *one-on-one* recruitment is the most effective approach, but is the most time-consuming. *Direct mail* reaches the most prospective members, but is not as personal. *On-site recruitment*, whether at an exhibit booth, membership table, or an orientation during a meeting, can be an effective introduction to the local association.

A successful campaign requires maximum participation from the association. The constituent and component officers cannot do it all. Tap into the talents of current members. Before you can identify your volunteers, you will need to understand your members' strengths. If you are trying to recruit recent graduates, ask a member who has recently graduated to target that group. For the more outgoing volunteer, ask them to serve as a prospective member greeter at local meetings. For those who are efficient at data processing, you may have them personalize the recruitment letters.

The next step is to assign responsibilities. Break the "to do" list into small tasks. People are more willing to participate if they know that the work is evenly distributed and attainable. Arrange a kick-off meeting to explain the campaign goals and objectives. Be sure that the assignment has a clear beginning and end. Explain how their role affects the strength of the whole association. Discuss their own goals and how they fit into those of the constituent. Provide ample opportunities for questions and answers.

Now that the logistics have been established, it's time to implement the campaign. The membership committee is responsible for coordinating the implementation. Committee members should regularly communicate with the volunteers; ensure that they have the materials necessary to complete their responsibilities; follow the time line, and monitor progress. It is crucial that the membership committee solicit feedback from the volunteers and if necessary, make modifications to the campaign strategy. Nothing is set in stone. If direct mail alone has a low response, you may want to tie it to on-site recruitment, followed by a personal phone call.

Keep the lines of communication open with your volunteers throughout the campaign.

Finally and most importantly, welcome the new members. Set up a process where the new member receives immediate notification that their application has been received. Send a postcard, make a personal phone call, mail an invitation to the next meeting, announce them in your newsletter, hold an orientation for new members, and send a "welcome" packet. Reiterate the benefits of membership. Buddy up new members with long standing members for their first meeting. Introduce them at the meetings. Inform them of volunteer and social opportunities in the association. Ask for feedback. Is this what you thought membership would be? Then hopefully, they can serve as volunteer recruiters for next year's campaign.

### **Developing a Prospect List**

Easily defined target groups for your recruitment mailing are:

- Recent Graduates -- A list of graduating student members is provided by ADHA to constituents and components every spring. Since dental hygiene students are not required to become student chapter members, some schools may have a few students who do not become ADHA members. To have a thorough prospect list, you may want to contact the school and obtain a roster of graduates to cross-reference against ADHA's list.
- Former ADHA Members -- By comparing current membership rosters with past ones, you will be able to form a list of non-renewed members, or contact the Member Services division for a list of lapsed members over the past couple of years.
- Dental Hygienists Who Have Never Been Members -- The state licensing agencies in your state will most likely provide you with a list of all licensed dental hygienists for a minimal fee. Or you may contact ADHA for this list which we maintain in our Master File. You can then cross-reference this list against your membership roster to identify potential members.
- Referrals -- A great source for names of prospects is your current membership. Ask members for names of friends and acquaintances who are hygienists. Also, be sure to keep a list of names and addresses of those who attend your meetings and courses.

Each of these groups may be further identified. For example, recent graduates can be further categorized by those who were student chapter members and those who were not. The concept of defining your target group is central to marketing. Also, request the list of prospects for your state that the central office maintains.

### **Recruitment Approaches**

There are a variety of approaches available for recruiting prospective members. The following information is not all-encompassing but rather is intended as a guideline.

#### One-on-One Contact

The personal approach of one-on-one recruitment is the most effective enlistment technique. You have the opportunity to control the message and more importantly, to answer questions. Face-to-face contact works best because it makes it difficult for the prospective member to refuse your request, especially when the recruiter is a friend.

- Be knowledgeable about the benefits of national, constituent, and component membership.

If you are not clear about the benefits at the state and local levels, contact your constituent or component membership chairs. Stress both the tangible and intangible benefits such as legislative action, consumer/public relations activities, social and professional networking, etc.

- You may wish to precede the initial contact with a letter or email explaining the benefits of membership. Then when contacting the prospective member, use the letter as a means to introduce the purpose of the call. Ask if the letter was received and if the prospect had any questions about the letter.
- Attempt to get the prospect involved in your conversation by asking her/him questions. Ask if they have considered membership. By doing so, you can better identify the benefits of most interest to the prospect. Tailor your message and talk about issues/benefits that are important to her/him.
- Try not to use the word "should" in your conversation with the nonmember, as in: "You should be a member." While you may believe that membership is your professional obligation, placing guilt on a prospect for not being a member doesn't work.
- Ask them to join. One of the major reasons given by prospective members for not joining their professional associations is that they were never asked! Once they have stopped asking questions or offering objections, ask them if they would like to complete a membership application. At this point you will receive a positive response, questions, or further objections. If the person would like to think about it or take the membership material with her/him, remember to follow up.
- Be prepared to respond to possible objections made by the prospect for not joining. If the prospective member makes a general statement such as "I don't want to join" or "I need to think about it", a useful question you can ask is "Is there something about ADHA membership that you're unsure about?" This will help define what the real objection is. If you don't know the answer to the question, state that you are unsure but that you will investigate and get back to her/him promptly.

#### Email or Direct Mail

Email and direct mail are effective means to communicate a consistent message to a large number of prospects. But email is cheaper – so be sure to collect this valuable data from potential members with an option on all forms for them to “opt-out” (to avoid can-spam legal issues). ADHA members have the opportunity to opt out of mailings at their respective annual dues renewal. But you must provide an opt out option to non-members at all times. Listed below are tips for writing a direct mail piece.

1. Begin by personalizing the letter, if possible. If a generic opening is your only option, try opening with "Dear Colleague". This puts the reader and writer on the same level.
2. The best way to hook a readers' attention is to mention a topic or issue of importance to them.
3. Emphasize your major points at the very beginning of the letter. You want them to be able to identify the purpose of the letter within the first few sentences.
4. The content of the letter should appeal to the target audience and identify the primary benefits of membership of particular interest to them. For example, recent graduates may

be most interested in finding employment and insurance coverage. In your letter to them, you would emphasize your placement service and the different insurance programs offered through the association.

5. Discuss the benefits of membership and not features. For example, a member receives a subscription to the *Journal of Dental Hygiene* and *Access*, which is a feature. The benefit is that these publications keep her/him apprised of changes in the profession and therefore add to her/his professional knowledge.
6. A good direct mail piece makes the recipient feel almost like he or she has heard from a friend. Include a personal testimonial to the importance of membership. But also concentrate on "you" and what membership does for the reader.
7. Close the letter by inviting them to join. The word "invite" sends a message that the prospect is important to the association. Make it simple for them to join by including a membership application and reply envelope.

### On-Site Recruitment

On-site recruitment is an effective way to attract prospective members during constituent and component events.

As with one-on-one marketing, it is important that the recruiters be knowledgeable about the membership benefits and the tri-partite structure and be prepared to respond to a variety of questions. Have plenty of membership applications and membership informational brochures available.

- An exhibit booth or membership table at your meetings is an efficient way to recruit new members.
- Send invitations to prospective members encouraging them to attend meetings. Offer first-timer orientation sessions prior to constituent and component meetings. Use the orientation as an opportunity to ask "What do you hope to achieve by joining the association?" Then identify current members to serve as "greeters" to prospective member participants.
- Tie your recruitment campaign with the constituent annual meeting. Send programs, registration forms, and membership information to all prospective members in the state and set fees such that it is an incentive for prospective members to register for the meeting as members--either through reduced registration fees, reduced course fees, or reduced membership dues. Have a membership table near the registration area.
- Contact prospective members pre-registering for CE courses and offer a discount for joining at that time. Or offer free admittance to a CE course as an incentive to the member who brings the most prospective members to a meeting. You may wish to invite prospective members to meetings and hold a raffle for one free membership.
- Always offer to complete an application for membership on-site. If the prospect still does not want to join, be sure to take her/his name, address, and phone number for future contact.

### **Recruitment Ideas**

Listed below are ideas for recruitment strategies that have been shared by constituents during past Membership Networking Sessions and workshops.

- Have a membership table with applications and benefits information at every

meeting.

- Distribute meeting notices and/or membership information to local dental offices.
- Contact former classmates who are not currently members.
- Encourage all members to have at least one application on hand at all times.
- Have members serve as greeters at meetings and encourage them to introduce themselves to the potential member meeting participants.
- Offer study clubs at a discount to new members.
- Waive or discount dues for members who recruit at least one member.
- Provide a financial incentive to components with highest annual percentage increase of members.
- Offer a membership networking directory to new members.
- Give the local dental society a member contact name so they can refer questions from nonmember hygienists regarding membership.
- Offer new member door prize drawing for new members at CE courses.
- Contact new licensees by phone or give component presidents list of licensees for follow up.
- List your constituent's phone number in the yellow pages.
- Insert application in your organization's newsletter, if mailed to all dental hygienists.

## **Sample Presentation "Benefits of Membership"**

When you become a member of the American Dental Hygienists' Association, you take an important step in your career. You assure your professional stature; you belong to an organization that encourages your involvement and represents you nationally; and you benefit from exclusive membership programs and services.

Since 1923, the ADHA has been a significant and rewarding dimension in thousands of dental hygienists' lives. Dental hygienists are committed individuals who have discovered that the ADHA is an ongoing and invaluable resource.

The mission of the ADHA is to advance the art and science of dental hygiene by ensuring access to quality oral health care, increasing awareness of cost-effective benefits of prevention, promoting the highest standard of dental hygiene education, licensure, practice, and research, and representing and promoting the interests of dental hygienists.

ADHA has established goals that support the organization's mission and address issues affecting the dental hygiene profession. Some of the goals focus on the need to promote the dental hygiene profession as an integral component of interdisciplinary health care; promote consumer advocacy in oral health care as a part of total health; promote the dental hygienist as a primary care provider of preventive and therapeutic services.

The decision to join ADHA has always been based on a strong personal commitment to the dental hygiene profession. An underlying ingredient involved in that decision—for dental hygienists of the past and the future—is the belief that only through a united effort can dental hygienists effectively promote their profession.

As the largest professional organization representing the interests of dental hygienists, ADHA has the vast pool of resources to substantially impact your future. Our members enjoy professional support, educational programs, and numerous opportunities to participate in association decision making and leadership.

When you become a member of the ADHA, you automatically become a member of your state dental hygienists' association (Constituent) and your local dental hygiene society (Component). Your constituent and component strive to meet your needs at the local level by sponsoring continuing education programs, community outreach activities, and networking opportunities with your peers. (Refer to member benefits and categories)

## Sample Recruitment Letter

<Date>

<Name>

<Address>

Dear <Salutation>:

Dental hygienists in many states are facing a professional crisis. Legislative and regulatory tactics that allow preceptorship or dental assistants to perform dental hygiene functions, such as supragingival scaling, are threatening the value of the RDH credential and the future of the dental hygiene profession.

The American Dental Hygienists' Association--the largest professional organization representing the interests of dental hygienists--has been working with state dental hygiene organizations to fight these threats, but we need your help. Only by uniting and working together can the dental hygiene profession speak with one strong voice to protect the scope of practice and professional status you have worked so hard to achieve.

How can you afford not to become a member of ADHA? As a member, you will have the opportunity to make a difference by participating in association decision making about the future of dental hygiene. The tangible benefits alone make joining ADHA an unbeatable value; your membership is your insurance for a rewarding career in dental hygiene. But even more important, your membership dues will help us protect your livelihood and professional status.

Members enjoy professional support, access to information, educational programs, and numerous opportunities to participate in association decision making and leadership. Joining ADHA now means combining forces with more than 35,000 of your colleagues from across the country.

I invite you to become a member of the American Dental Hygienists' Association. To become a member, simply complete and return the enclosed application with your dues payment. I look forward to welcoming you to ADHA.

Sincerely,

President

## Sample Recruitment Letter - Graduates

<Date>

<Name>

<Address>

Dear <Salutation>:

Our records indicate that you will graduate soon. On behalf of the (American Dental Hygienists' Association, constituent, or component), congratulations on this significant achievement!

As a Student Member, you have had an opportunity to discover what it means to be a member of ADHA. As you begin your career, make a commitment to your profession and stay connected with over 36,000 dental hygienists who have chosen membership in ADHA. Now is the time to:

- **Stay Informed.** You just dedicated the past few years preparing for a career in dental hygiene. To continue that education, publications, such as *Access* magazine and the *Journal of Dental Hygiene*, will keep you apprised of the latest oral health care news and developments in dental hygiene research.
- **Develop Professional Contacts.** Membership in ADHA at the national, state, and local levels provides you with endless opportunities for building professional relationships.
- **Secure Your Future.** Through membership, you will help to secure a future for dental hygiene. ADHA is working to protect the value of your educational credentials and to preserve the integrity of your license. Only through uniting in one voice can ADHA continue to represent the dental hygienist effectively. Your membership will also provide you with the opportunity to apply for several types of insurance such as professional liability, disability, and major medical at competitive premiums.
- **Take Advantage of Employment Opportunities** – ADHA offers an Employment Opportunities Center, an interactive Web-based employment service for dental hygienists seeking employment and employers seeking dental hygienists. This service is free to members seeking employment. Members may also benefit from state employment referral services, national classified advertising, and employment reference materials.

Maintaining your ADHA membership has never been easier. Simply complete and return the enclosed application with your dues payment. If you have questions, call the Division of Member Services at 312/440-8900 and select #1.

Sincerely,

## Sample New Member Welcome Letter

<Date>

<Name>

<Address>

Dear <Salutation>:

Welcome to (ADHA, constituent, or component)! You have become a member of the largest association that is recognized to serve the dental hygiene professional.

As an active member, you will have access to numerous membership benefits, such as a subscription to *Access* magazine and web access to the *Journal of Dental Hygiene*. You will also have access to several insurance programs, such as professional liability, disability, major medical, and more through ADHA.

In addition, you will have access to (highlight constituent and component benefits).

If you have any questions about membership in (constituent or component), please call (membership chair). If you have questions about ADHA, please call ADHA's Division of Member Services at 312/440-8900. They will be happy to help you. Thank you for showing your support to ADHA and its goals by becoming a member.

Sincerely,

President

Enclosure

## Membership Benefits

ADHA offers its members a wide variety of benefits specifically designed to help better Empower, Support and Develop YOU! ADHA has partnered with the following affiliates, keeping in mind what our members have expressed as beneficial to their everyday lives. These benefits are applicable both personally and professionally. All ADHA members are eligible to receive the benefits. Please note that benefits are added all the time!

*Information on how to redeem the following benefits can be found by logging into your member's only account and clicking on the member resources page. For instructions on how to access your account please visit: <http://www.adha.org/news/real.htm>*

### Access

Access magazine covers key dental hygiene issues in trend pieces that provide a balanced examination of all sides, while presenting dental hygiene and ADHA's positions, and advocating on behalf of the profession. The magazine also maintains a strong focus on federal and state developments and provides readers with the latest in clinical topics.

### ADHA Career Resource Center

ADHA is proud to announce a new career resource center to help guide dental hygienists to a position that fits their personal needs. <http://careers.adha.org> is your one stop shop to find career opportunities across the country. Dental hygienists are able to post their resumes and search through job postings and qualification requirements, all at no cost. Members are also able to post positions at a discounted rate.

### ADHA Credit Card/ Mileage program

ADHA Credit Card, offered by Bank of America, with robust WorldPoints rewards program allows members to earn points toward cash, travel or merchandise with every purchase made.

### ADHA Discount Rx Program

All ADHA members are eligible to receive a FREE discount pharmacy card. Our card is accepted at over 59,000 pharmacies nationwide. Names like Albertson's, CVS, Kmart, Osco, Kroger, Publix, Rite Aid, Target, Walgreen's and Wal-Mart all accept the AME Benefits Prescription Discount Card. ADHA members will save up to 55% on generic drugs and up to 15% on brand name drugs. Members can use this card even if they have a prescription benefit through their employer or if their plan has caps on their annual benefit. Medicare Part D recipients can use the AME Prescription Discount Card to cover gaps in their coverage or for drugs not covered by their plan.

### ADHA Online

[www.adha.org](http://www.adha.org) offers a wealth of resources and information available exclusively to members, as well as consumers, other health professionals, legislators and the news media. Some of the topics covered are oral health, education, governmental affairs, public health, ADHA news, industry news and event news, such as information about Center for Lifelong Learning (CLL) at Annual Session.

### ADHA Wireless Program

ADHA has a wide variety of cell phone packages available through numerous providers all available at the ADHA Wireless Center. All ADHA members are entitled to special discounts on products offered. As an added bonus now through May 2, 2009, visit the wireless center for information on how you can qualify to win a FREE Companion Airline Ticket.

### Center for Lifelong Learning (CLL) at Annual Session

Starting in Albuquerque, NM, 2008, Annual Session is all new, and all for YOU! We've listened to our members-voices and incorporated their ideas into a new format for our annual meeting. While still attending to the essential business tasks of the association, we've placed the focus on Empowering, Supporting and Developing YOU! We've greatly expanded the CE offerings so that every dental hygienist from first-year students through our current association president will walk away with invaluable knowledge on the latest trends and techniques in dental hygiene practice. With many hands-on, lab-based continuing education courses, CLL is a wonderful opportunity to see how cutting-edge education can be applied to everyday practice. Additionally, CLL provides a place to develop relationships with colleagues nationwide and unlimited potential to keep informed on issues affecting hygienists across the country.

### Continuing Education

Current members receive discounts on continuing education through online courses, Center for Lifelong Learning (CLL) at Annual Session, as well as constituent and component continuing education functions.

### Discounted Auto Insurance

ADHA has a special discount program available for all members with GEICO insurance. GEICO provides auto insurance to over 9 million customers across the country and provides 24-hour service, 7 days a week, 365 days a year. By taking advantage of the ADHA group affiliation every member is eligible for an 8% savings (in most states).

### Discounted Car Rental Available Through Hertz

ADHA members are welcome to take advantage a special 10% discount off all Hertz standard cars and a minimum discount of 5% on all Leisure rental rates. This discount can be used at all Hertz locations.

### Discount Loupes

ADHA is proud to have Orascoptic as our official loupe sponsor. For over twenty years, Orascoptic has provided loupes, lighting systems, and ergonomically sound operator's chairs for dental professionals that make everyday practice easier and more exacting. Renowned for quality craftsmanship, the company continues to remain on the forefront of new technology that will enhance your career and the quality of patient care. ADHA members can receive a 10% (or greater) discount off retail pricing on all Orascoptic loupes and have the option for a nine (9) month interest free payment plan. Additionally, all members will receive a \$100 dollar discount off retail pricing on all Orascoptic LED light systems.

### Discount Scrubs

For more than 20 years dental professionals have turned to the Tafford brand for scrubs and uniforms that incorporate the style, comfort, and individuality of sportswear and still function in

a fast-paced work environment. Today, Tafford is a recognized leader in service, style, and innovation with hundreds of thousands of customers ordering their professional wardrobes exclusively from Tafford. ADHA members automatically receive 10% off all purchases of Tafford Scrubs, Uniforms, and Lab Coats. Plus you'll receive free shipping on all orders over \$100 through Dec. 31, 2009. Access your discount by visiting the Tafford online store. Or by calling Tafford directly @ 1-888-TAFFORD (823-3673).

#### eHuman.com Discounts

ADHA has partnered with Brown & Herbranson Imaging, Inc. ("B&H") and their wholly-owned subsidiary eHuman ([www.eHuman.com](http://www.eHuman.com)) to bring members a wide variety of products. eHuman provides 3-D interactive technologies, software simulators, and electronic curricula systems and best-in-class digital libraries of human anatomy to the spatially-complex field of dentistry. The following products are available at a discount to our members:

3-D Tooth Atlas v.5.0 - Hygiene Edition

3-D Tooth Atlas v.5.1

3-D Skull Atlas v.1.0

Bassett Online Dissection

Electronic Atlas of the Human Occlusion and the Temporomandibular Joint

#### Employment Assistance

ADHA is your professional partner supplying you with information on dental hygiene employment trends, a listing of accredited dental hygiene programs and state licensing authorities for entry into the profession. If you're moving out of state, we can put you in touch with an ADHA hygienist in your new locale who can help you find work and navigate local regulations. Members also have the benefit of our Employment Reference Guide and sample resumes and contract templates all available on the member resources section of [www.adha.org](http://www.adha.org).

#### Employment Reference Guide

We understand finding employment is a major undertaking, and we want our members to conduct the most effective job search possible. With the Employment Resource Guide our members have tips and examples to walk them through each step of the process, including where to find job postings, resume writing, interview skills, contract negotiation, independent practice and licensure in states across the nation.

#### Hotel Discount Program

As a member of the ADHA you will receive an additional 10% off the "Best Available Rate" at participating locations every time you travel. Whether you are looking for an upscale hotel, an all-inclusive resort or something more cost-effective, we have the right hotel for you... and at the right price. So start saving now. Call our special member benefits hotline and reserve your room today at one of these fine hotels:

AmeriHost Inn®  
Howard Johnson®  
Super 8®  
Wyndham Hotels

Baymont Inns  
Knights Inn®  
Travelodge®

Days Inn®  
Ramada®  
Wingate by Wyndham®

### Institute for Oral Health

Members may apply for research grants and over 20 different scholarships through ADHA's Institute for Oral Health (IOH). The IOH encourages and promotes professional excellence through scholarships and quality research in collaboration with ADHA.

### Insurance

Members have access to a variety of insurance policies through Marsh Affinity Group Services. In collaboration with Marsh Insurance ADHA has approved an insurance package specifically designed for the dental hygienist. With ADHA's Professional Liability Insurance from Marsh, you'll be financially protected in case you are named in litigation. In addition to liability insurance, members are available to take advantage of other coverage including: Major Medical, Disability and Life insurance. Please note coverage and availability varies by state.

### Identity Theft Protection

Through ADHA's partnership with Marsh, we have launched ID TheftSmart that is available online. This program will provide members easy access to the information and services necessary to fight against identify theft. This service is designed to alert members of suspicious account activity and restore credit. Since 1999 this plan has been the only one of its kind to offer the services of licensed investigators – professionals specially trained to recognize the intricacies of identity theft and resolve the issues that have arisen. Four levels of coverage are available for our members to choose from starting from as low as \$7.95 monthly.

### Journal of Dental Hygiene

The *Journal of Dental Hygiene (JDH)*, dental hygiene's premier research publication provides original research conducted and presented by dental hygienists in the profession. *JDH* is a peer-reviewed, scientific journal published on a quarterly basis. *JDH* is an online-only publication, available on a password-protected secure server to all ADHA members and *JDH* subscribers.

### Leadership Opportunities

Becoming active in ADHA provides you with the opportunity to acquire and develop new skills and interests. Leadership opportunities offer interested members opportunities at local component levels all the way to the ADHA National Board of Trustees. The possibilities are unlimited.

### Recognition

By making contributions to your community's oral health standards through professional activities with your state and local associations, members receive the recognition they deserve. Professional membership builds an identity for you and the dental hygiene profession.

## Membership Categories

### Voting

**Active Members.** Active membership may be granted to any individual who (i) has either earned a certificate or professional degree in dental hygiene granted pursuant to a dental hygiene program offered by an accredited college or institution of higher education, or is licensed to practice dental hygiene in the United States under the provision of a “grandfather clause”; and (ii) is licensed to practice in any state, territory or possession of the United States if such license is required for the practice of dental hygiene; and (iii) agrees to maintain membership in a Constituent as well as a Component (if such exist where the member is licensed, practices or resides).

**Retired/Senior Status.** Active members who have reached the full retirement age as set by the Social Security Administration and have either been an Active member of the Association for an aggregate total of thirty (30) years, or twenty-five (25) consecutive years may apply for Retired/Senior status.

**Members with Disabilities.** Active members who are unable to work due to a verified disability may apply for Disabled status. All such applications must be verified by such member’s Constituent and/or Component, and must be accompanied by proof of eligibility each year.

**Life Members.** Life membership may be granted by the House of Delegates to any active member who (i) has made significant contributions to the Association and the dental hygiene profession; (ii) submitted an application for Life membership to the Board of Trustees at least 30 days prior to the fall Board of Trustees meeting; (iii) is nominated by the Board of Trustees; and (iv) meets such other criteria as determined by the Board of Trustees from time to time. Notwithstanding the foregoing, all of the Association’s Past Presidents completing a full term in office automatically shall be granted Life membership.

### Non-voting Members

**International Members.** International membership may be granted to any individual who (i) resides outside of the United States; and (ii) holds a valid license to practice as a dental hygienist.

**Student Members.** Student membership may be granted to any student (i) currently enrolled in an accredited dental hygiene program; or (ii) who has graduated from an accredited dental hygiene program and is currently pursuing a baccalaureate or graduate degree complementary to a career in dental hygiene in an accredited college or institution of higher education.

**Supporting Members.** Supporting membership may be granted to any licensed dental hygienist who (i) is not employed in a dental hygiene-related career; and (ii) agrees to maintain membership in a Constituent as well as a Component (if such exist where the member is licensed or resides).

**Honorary Members.** Honorary membership may be granted by the House of Delegates to any individual who (i) is not a dental hygienist; (ii) has made outstanding contributions to dental hygiene or dental health; and (iii) has been nominated by the Board of Trustees.

**Allied Members.** Allied membership may be granted to any individual who supports the purposes and mission of the Association and who is not otherwise qualified for any other class of membership.

**Corporate Members.** Corporate membership may be granted to any corporation, partnership, institution or organization that supports the Association's mission.

## Membership Retention

Once you've recruited a member, how do you keep them in the organization? As with the recruitment of new members, there are a number of ways to communicate the importance of membership through marketing efforts. This includes contact with members immediately before, during, and after expiration to reduce membership attrition.

First impressions last. Your retention efforts should begin the minute the new member submits their application. Help the member take advantage of the benefits and encourage involvement as soon as possible.

- Recognize new members in your newsletter.
- Encourage officers to contact each new member personally to welcome him or her into membership.
- At local meetings, have members serve as personal greeters. Ask that the greeters introduce new members to the group.
- Help new members get the most from their membership by organizing a new member orientation meeting or packet. Let the member know immediately what services are available at the constituent/component level as well as national.
- Develop a member involvement questionnaire for new members. Ask questions about their interests and areas of expertise. Include them on your volunteer list and member talent bank.

### Mailings

A special mailing or email to renewals (prior to receipt of their first renewal notice) or a special section in the newsletter may focus on what the association has accomplished for the profession or the membership in the past six months to one year. This serves as a reminder to renewing members of what their dues have been used for and how the member benefited. You can also list upcoming activities in the mailing as a way to let the member know what they will miss if they do not renew.

### Surveys

Send a survey or questionnaire before dues notices arrive. List the member benefits and ask the member about the value they perceive and their level of usage or participation. Most often, uninvolved members will not renew. This survey is a good opportunity to find out what members want from their affiliation with your organization and what benefits are most popular. It is also a way to get members involved by asking if they'd like to volunteer. Remember, if the survey is too long, some members won't respond. In terms of retention, the greatest benefit to a survey or questionnaire is that you'll know in advance who doesn't plan to renew and why. This gives you a perfect opportunity to call them and possibly fix the problem before their dues notice arrives. You can turn a dropped member into a continued member. A cover letter from the president or membership chair that reiterates why the member's response is important -- that the association values the member's opinion.

Survey assistance can be provided by central office by contacting the Research Division at 312/440-8900.

### **Follow-Up**

As we are all aware, first impressions make the difference. For associations, this means that the first year of membership is critical for retention. Follow up with new members throughout their first year. Personal contact is ideal, but also time consuming. You may want to conduct a "How Are We Doing Survey?" to members within the first six months of joining. The feedback will provide you with valuable information on how to better meet the needs of new members. The survey can also be an effective way to reiterate the benefits of membership.

It is just as important to follow up with non-renewed members before it is too late. ADHA provides constituents and components with lists of non-renewed members during both dues billing cycles. Throughout the dues cycle, members receive three notices, a letter from the president, and a follow up call by telemarketers. If members choose not to continue their membership, ADHA sends them an exit survey. Again, the results of the exit survey provide valuable feedback that can be used to improve membership programs and services.

### **Retention Rate**

Statistics are important when the association develops its marketing plans. You must know where you stand currently so that you can set realistic objectives for the future. It is essential to know the percentage of members who are renewing, which is called the retention rate. It is computed by dividing the number of members who have renewed by the number who were eligible to renew at the beginning of the cycle.

$$\text{Retention Rate} = \frac{\text{Number of Members Who Renewed}}{\text{Total Number Billed}}$$

A common error made in this computation is that the total number of members at the beginning of the cycle is divided by the number at the end of the cycle. Since this would include all new and reinstated members, it is not an accurate picture of retention or attrition. However, this percentage will indicate your overall growth or loss.

### **Retention Ideas**

Listed below are retention ideas shared by other constituents and components during past Membership Networking Sessions and workshops.

- Prior to renewal, mail a flyer that details the membership benefits and lists association resources.
- A Phone Call a Day...Ask each member to call one new member a month to introduce themselves and to reinforce the benefits of membership.
- Offer job search assistance seminars free to members. The seminar can include a panel discussion including current members from various employment settings.
- Feature members with upbeat personal stories in each issue of the newsletter. Also recognize and officially welcome new members.
- Offer gift certificates to discounted continuing education courses to long term members on

their anniversary date.

- On a new member's first anniversary, send them a "How Are We Doing?" survey.
- Mail welcome packets to new members within the first month of joining. Develop a "Now That I'm a Member, What's Next?" flyer for inclusion with new member welcome materials. The flyer can list activities to become involved in association activities. Encouraging involvement early on will ultimately provide a larger pool of volunteers for completing association activities.
- Offer a membership directory and dental hygienists' resource guide free to members.

## Sample Retention Letter

Date

Dear :

We were recently notified that you have not yet renewed your membership in the American Dental Hygienists' Association. If you feel that there is a misunderstanding or you have received this notice in error, please call ADHA's Division of Member Services at 312/440-8900, press #1.

As you are already aware, ADHA is a professional organization *of* dental hygienists *for* dental hygienists. Membership in ADHA means:

- **Access to Information** - Through your complimentary subscription to *Access* and the online versions of the *Journal of Dental Hygiene* and *Update*, you can stay abreast of topics about clinical practice, research, and education
- **Insurance** - You have access to a variety of insurance plans such as disability, professional liability, and major medical.
- **Continuing Education** - ADHA membership offers you educational opportunities through self-study courses, the ADHA Center for Lifelong Learning, and constituent and component continuing education functions.

Probably more important than the tangible benefits of membership are the rewards to you and your profession through your support of ADHA.

- **Security** - Through membership, you help to secure a future for dental hygiene. In these times, with issues such as preceptorship threatening our profession, ADHA is working to protect the value of our educational credentials and to preserve the integrity of your license. Only through uniting in one voice can ADHA continue to represent the hygienist effectively.
- **Professional Networking** - Through your state constituent and local component organizations, you have the opportunity to network with your colleagues and to participate in meetings that meet your personal and professional needs.

In short, the benefits of ADHA membership are limited only by your involvement! We urge you to continue your membership in ADHA. To renew, simply call ADHA's Division of Member Services at 312/440-8900, #1.

Sincerely,

# Students - Everything You Need to Know

Student outreach is a key component to any successful association and ADHA is no exception. It is important to reach out to your local dental hygiene programs and establish a connection. This is the first step in developing positive student interaction with ADHA.

In order to deliver key messages and create this positive student interaction, it is important to build a comprehensive communications plan to engage the students in your state and local area. Work together at the state and local level to craft a year-long plan that complements all of the efforts at the local, state and national levels.

At the national level, we send regular communications out to the student members, student leaders and faculty. In the fall, we focused on membership and announce our scholarships, awards and leadership opportunities. In the spring, we continue to promote membership while encouraging attendance at the Center for Lifelong Learning at Annual Session. In addition, as graduation approaches for many programs, we promote graduating student transition.

A sample communications plan is included in this section. You are encouraged to use it to plan mailings, presentations, workshops etc. with respect to students. You can create a special committee or officer position focused on student relations to create and execute this plan. Please use a variety of communication channels to interact with your student members.

## **Social Networking**

Don't underestimate the impact of this new media. It is important to create and build a community. These tools allow you to do just that and give you an outlet to increase your communication to this group. Create a Facebook or MySpace page to connect your members and feature your events and news items. You can also set up a YouTube channel that will allow you to post videos such as coverage of your Annual Session, presentations, greetings etc. You should always be evaluating new technologies as a way to connect with students.

## **Mentorship**

Mentoring at the local level can have a very profound effect on students. It is at this level that a one-on-one relationship can be forged. Most importantly, students want a "Friend in the Field", someone who can share experiences and information that is not available through the dental hygiene program.

To create a formal mentoring program, develop a list of hygienists in your area who are willing to serve as individual mentors or contacts. These mentors could be utilized to answer student questions, and to provide information about specialized or alternate practice settings. The mentors should be encouraged to form personal as well as professional relationships with their protégés. This person may have a strong impact on the protégé's life.

Once a list of willing mentor candidates is created, go to the dental hygiene programs and explain this program for mentoring. Let the students know how their mentor can help them. Then, for those willing to participate, pair up students with appropriate mentors. Take into consideration background, future goals and student input when matching mentors to students.

## Additional Mentoring Opportunities

Appoint a student to sit on the component board in an honorary position. This position would demonstrate to the student the importance of association membership while

developing future leaders for the component and constituent.

Assist students in securing vacation and school break employment in dental offices or in alternate practice settings. Students could serve as chair side or hygiene assistants, front office clerks, temporaries for dental manufacturers or even assist a lobbyist. This experience will benefit the student and give them a "feel" for genuine office environments. This is also an opportunity for students to develop a network of potential references and employers.

Involve students in association sponsored community outreach activities. Students could assist in collecting donations, putting together supplies and distributing goods to shelters, hospitals, nursing homes, etc. They can also assist in presenting programs and oral cancer screenings during dental health fairs. Include them in National Dental Hygiene Month activities.

Ask component members to volunteer to help students prepare for their boards on a one-to-one basis. Assist students in finding appropriate board exam patients or provide a setting where potential patients can be screened. Contact the clinic coordinator at your local dental hygiene program and see how you can work together to help the students. Keep in mind there are various challenges to assisting students in finding a board exam patient and it is important to explore how to address these issues with the clinic coordinator.

Listed below are ideas for student and graduate mentoring that have been shared by constituents during past Membership Networking Sessions:

- Send constituent or component newsletter to dental hygiene programs.
- Offer constituent/component calendar of events to transitioned graduates.
- Invite students to join members at Lobby Day at the Capital.
- Hold a pizza employment party for graduates. It provides graduates with an opportunity to discuss questions about upcoming board exams and employment opportunities.
- Distribute stress kits (include pencils, juice, antacid, aspirin) to students prior to national boards.
- Offer table clinics during Annual Session. Award free membership or scholarships to winners.
- Invite all students to attend constituent Annual Session free of charge.
- Offer Outstanding Student Award to the student who has become actively involved in the student member group, component, or constituent.
- Offer awards for books for first year students and free membership for graduates who become involved in component or constituent activities.
- Offer scholarships to local student members who are active in component.

### **Programming and Presentations**

Connecting with the local dental hygiene programs should be done early in order to schedule an opportunity to speak at the school or invite the students to a presentation. Keep in mind

the dental hygiene curriculum is intense and the students' schedules are full. This is a prime opportunity to foster a personal connection that the students can maintain throughout dental hygiene school and continue to build upon after graduation.

When working with the dental hygiene programs regarding programming, make sure you clearly explain whether the meetings will be driven by a professional topic (such as a CE) or if the program is geared toward the students. The students will feel more comfortable and prepared if they understand what is expected of them. At each event, it is important to acknowledge the students who attend so they feel welcome. It is not recommended to invite students to attend a business meeting as they will not possess the requisite background to fully understand the proceedings or get substantial value out of attending. However, it is recommended to focus one meeting a year on dental hygiene careers. Try to have speakers from a number of different practice settings. It is always a good idea to invite the students free of charge whenever possible.

When hosting a presentation for the students, make sure to prepare your speakers. Encourage them to be honest, but positive when discussing their experiences or the profession. During a panel or traditional presentation, it is always good to have some prepared questions ready to get the "Q & A" portion started, if necessary. Encourage your speakers to use PowerPoint wisely, highlighting the key information and incorporating images.

At these meetings, always stress the importance of professional membership in *their* dental hygiene association.

#### Additional Presentation Ideas

Assist students by providing a Board Exam Review Program. Try to make this event fun as well as informative. Make a contest out of asking the questions. Award points for correct answers and give a small prize to the student who has the most points.

Hold mock "interview" sessions and provide feedback to help students sharpen their communication skills. While many schools provide resume and interview information, interviewing with a stranger can be very intimidating, especially for students with little work experience. Make sure students know what questions to expect, and what questions they will want answered before accepting a position.

Host a "How Do I Use My ADHA Membership?" presentation. Have different members give testimony and help students understand the importance of taking advantage of their ADHA membership.

## Sample Panel Discussion

### Professional Roles of the Dental Hygienist



The following is a program outline for a panel discussion on dental hygiene. Past and present association leaders and award winners are a good resource when selecting your panel. Keep in mind that speakers with varied backgrounds are going to provide the most value to your audience.

Panelists would be asked to discuss their development since dental hygiene school by addressing such questions as:

- How did you get interested in your present position?
- What steps did you take to develop your skills?
- What steps did you take to find your present job?
- What does your job consist of?
- What is your typical day like?
- What specialized skills or traits are necessary to be successful in your position?
- What are the advantages and disadvantages of working in this alternate setting?
- What obstacles have you encountered, and how have you overcome them?
- How has ADHA involvement assisted you in identifying and reaching your goals?
- How can students and hygienists find out more about your job?
- What is one thing you wish you had known before entering the profession?

Each panelist will have about 5-8 minutes to provide an overview of their employment setting, and may include slides or handouts, resources that may be helpful, products or services they offer, etc. Encourage your panel speakers to be flexible when answering questions or giving their introduction. Try not to repeat what others have said and instead

add something new to the conversation. After all panelists have spoken, the floor would be open for discussion and questions.

“Taking Advantage of Your Student Membership” ~ this presentation was created to give the students an overview of the ADHA and the services and benefits they receive as members. It is interactive and informative. Please use the presentation as an opportunity to build and sustain a positive relationship between your constituent/component and the dental hygiene students. Customize sections as you see fit to promote what you do at the state and local level to empower, support and develop student members. Most of all – have fun with it!

Presentations are posted on [www.adha.org](http://www.adha.org).

### Sample Student Communications Calendar

Please use the sample calendar below as a starting point to create your own strategy for reaching out to students. Customize the suggested outreach items to suit your particular situation. Use this tool to think globally about your student communications. Creating a year-long plan will allow you to easily maintain open, effective communication with the student members and incorporate specific types of media and messages that will deliver a positive return.

Month	Action	Description
August	Presentation	Contact local programs to schedule a presentation on campus (perhaps at orientation) Identify any programs that have non-traditional start/graduation times so you can adjust your communications accordingly Try to get student email address during the meeting so you can stay in contact
	Social Networking	Post a Welcome blog for new students and an invitation to membership
September	Meeting	Host a Welcome meeting/activity to kick off the school year
	Social Networking	Promote Annual Session (if meeting is in the fall) by having a past student attendee blog about his/her experience Post pictures from the 2008 meeting
October	National Dental Hygiene Month Activity	Collaborate with local program on a community service project
	Mailing	Send an invitation to the programs to attend your Annual Session
November	Email	Students (if you have emails) or student chapter advisor to promote scholarship, award and leadership deadlines
	Social Networking	Good luck on finals message Post pictures and blog about your Annual Session from a student attendee
	Mailing	Send a copy of your newsletter to all the dental hygiene programs in your state
December	e-Card	Send a holiday card to your student list

January	Email	Students (if you have emails) or student chapter advisor to promote scholarship, award and leadership deadlines
	Mailing	Send the dental hygiene programs a schedule of events for the remainder of the component year and follow up to see what the student would like to attend
February	National Children's Dental Health Month Activity	Collaborate with the local dental hygiene program on a community outreach activity
	Social Networking	Post a message about the community outreach project
March	e-Card or note	Good luck on National Boards e-card to individual students or encouragement note to program
	Gift	Create 'Stress Kits' for students taking National Boards /deliver to programs in your area
	Social Networking	Post a message promoting the Student Track at ADHA Annual Session
April	Mailing	Reach out to the students or program with a transition reminder
	Social Networking	Good luck message for regional boards
May	Meeting	Host a graduation event
	Social Networking	Post a message about transitioning your membership
June	Email	Invite graduates to summer component meeting
	Social Networking	Post a message and pictures from ADHA Annual Session
July	Social Networking	Ask your 'friends' to post to your 'wall' or discussion board the best part of their first year of dental hygiene school Post a reminder about student transition
	Planning	Start planning for the next school year!

### **Student Leadership Opportunities - Student Assembly**

Student members of the American Dental Hygienists' Association are invited to attend the association's Annual Session in June each year. Each dental hygiene program is entitled to send representatives to the Student Assembly. Each ADHA district elects a student delegate and alternate to attend Annual Session. Sometimes these students also serve as student representatives from their schools. The twelve student delegates then elect one student delegate to serve as the voting student delegate at the House of Delegates meeting.

### **Student Leadership Opportunities - Table Clinics/Poster Sessions**

The table clinic is an informal table top presentation using oral communication and visual media to inform, clarify and/or review material on a specific topic. The information presented may be a technique, theory, service, trend or expanded opportunity in the practice of dental hygiene and/or the realm of dentistry. The research poster session is a presentation of an original research study. Posters incorporate visual media that reflects an area of dental hygiene-related research significant to the participant. As a presenter, students have an opportunity to expand their knowledge in a special area of interest and to arouse curiosity and awareness of others in the profession through energy and creativity.

### **ADHA Membership - From Student through Graduation**

Although ADHA is divided into many separate and unique entities, each entity is an integral part of the successful operation of the association. Hopefully students will become Active Members of

ADHA and serving as officers, committee members, state delegates, and many other important roles.

Students of accredited dental hygiene programs are eligible for student membership in ADHA. Student membership dues are collected each fall when membership applications are submitted to the ADHA Member Services Division.

Student membership runs from January 1 to December 31. After graduation students should contact ADHA when they receive a license to practice dental hygiene. ADHA will change the student member to Active member status at no charge.

An invoice for a full year's Active Membership dues is mailed approximately six (6) months after graduation.

## Fundraising

Fundraising is one of the most challenging responsibilities of a component, but is also one of the most essential for supplementing non-dues revenue.

### Set Goals

The first step is to determine whether there is membership support for your efforts, either by survey or through your House of Delegates. Even if the leadership has a worthwhile goal in mind, you need to verify that this goal is shared by your membership. Then determine how much money you need to raise. Set financial goals based on researched prices. Outline a step-by-step strategy and look at the costs to implement each step.

### Define How to Accomplish these Goals

#### 1. Direct Mail

- Begin by clearly defining the product ---express your objective and the benefits.
- Identify promising prospects -- members, previous donors, and people with a vested interest in your success.
- Package the direct mail piece. Take some time to know your audience. Then design the letter so that it grabs their attention - you need to get the letter opened. Most importantly, you need to get the reader to respond.
- Make it easy for them to give. Use return envelopes, credit card forms, options to pay over time.

#### 2. Telemarketing

Considering the expense of telephone use, you may not wish to use telemarketing as a primary mode of solicitation. If you do use telemarketing, tie it into a mailing and develop a script so that each volunteer conveys a consistent message.

#### 3. Grants

Grants are defined as a single large gift given towards the accomplishment of a stated purpose. Grants can be obtained from a variety of sources - independent foundations, funds established by corporations, charitable or social action groups, and other associations.

It is important to locate an appropriate donor and convince them that you are pursuing the outcome that they want.

Use a mission statement. Be able to list goals and objectives. Prepare descriptions of current and proposed programs. Document past successes.

#### 4. Corporate Donations

Corporations give donations with business goals in mind. Successfully soliciting corporate donations almost always requires providing a promotional opportunity for the company. Most donations will be in the form of goods or services. Create a shopping list of tangible items that you will need and assemble a list of businesses with the ability to supply them.

#### 5. Events

Events require more planning than any other type of fundraiser because they require time, attention to detail, but also because you only have one chance to do it right. See the section on meeting planning.

#### 6. Selling Products, Advertising, and Services

Selling products is an easy way to begin fundraising on a limited scale. Experiment with your own membership. Sell items that people use all the time or that are personalized.

Consider selling advertising in your newsletter, in a specially produced ad book, or in event books.

Sell services such as a speakers' bureau, participate in market research or focus groups, form a talent bank that capitalizes on members' talents.

### **Follow Up**

Follow-up is the key to fundraising. Give people more than one opportunity to give. Personal thank you notes should be sent within five days of receipt of the donation. Then keep the donors involved. Send literature to update the donors on the progress of the project and other non-fundraising activities.

### **Contracts and Taxes**

Don't assume that anything is "understood". A contract is a mutual agreement between parties obligating each to do something for the benefit of the other. It should be a written document signed by both parties. Just because someone gives you something does not mean that they have made a "charitable" contribution that can be used as an income tax deduction. Generally speaking, the recipient organization must be a not-for-profit charitable corporation registered with the IRS as a 501c (3) organization. Check with your financial advisor, the IRS or the state tax department to determine which rules actually affect your organization.

The bottom line of fundraising is that people won't give money, if you don't ask. Fundraising is all about understanding how to motivate people and how to sell good ideas. For more information, contact ADHA's Division of Governmental Affairs.

### **Corporate Philanthropy**

Companies generally administer their charitable giving through corporate foundations (grants), corporate giving programs (sponsorship) and matching gift programs (employees). Companies do not use sponsorship to replace advertising, public relations or sales promotions. Corporations give sponsorship support for a variety of reasons including increasing brand loyalty among constituents and showcasing community responsibility at component levels.

To successfully garner corporate funding for constituent meetings, research and communication methods must be employed. The following bullet points are some suggestions for researching and communicating with corporations:

- Contact the marketing department of corporations to get information about their sponsorship and philanthropic strategies
- Network with local branch managers, company representatives or employees of businesses in your area
- Read business section of local newspapers to get idea of corporate cultures and activities in your area

- Promote the mission and work of ADHA at local business networking functions, such as Chamber of Commerce meetings
- Look for announcements of the opening of local businesses since they will be looking for acceptance into the community
- Research companies through library resources or Internet business search engines, i.e. Yahoo Finance or Hoover's
- Utilizing corporate speakers' bureaus as a source for speakers at constituent meetings and, in turn, promote your membership to businesses as a source of potential speakers

## **Meeting Planning**

The term planning means the process of bringing together all of the elements involved in producing a successful conference. There are several steps to planning a meeting:

1. A meeting coordinator and committee are selected.
2. Meeting goals are established.
3. Responsibilities are assigned.
4. A site is selected.
5. Presenters/speakers are selected.
6. Conduct marketing and public relations to promote meeting.
7. The meeting is held.

### **Three Major Factors to Consider**

- 1) Purpose - A meeting must have a purpose, such as membership, annual business meeting, continuing education, board meeting.
- 2) Participants - Who will attend? Most likely, it will be members of the association, however, you may also include prospective members, other allied health professionals.
- 3) Design - The design of the meeting must reflect the purpose and participants. A theme should be established that relates to the goals and mission of the organization.

### **Site and Function Room Selection**

You cannot overstate the importance of the meeting site. The following types of sites are most often used for meetings: hotels, conference and convention centers, universities, resorts, public buildings. Keep a written record of the pros and cons after each site visit.

Take into consideration the following: location, past history, service facilities, accommodations, site personnel, public areas, financial factors, safety.

The selection of function rooms has a direct relationship to site selection. The number and location of the rooms should be related to the design, flow, and traffic of the meeting. Consider audiovisual needs, ambiance, and lighting.

### **Presenters and Speakers**

Presenters may be categorized into two main groups - speakers and resource people. Speakers make presentations at general sessions; those who make presentations at other sessions, such as concurrent sessions, breakout sessions, and workshops are referred to as resource people.

Request proposals well in advance of the meeting. When reviewing the submitted proposals, determine if the presenter's topic coincides with the purpose of the meeting and mission of the organization. Once the speaker is selected, a contract should be signed which outlines the responsibilities of both parties. Provide the presenter with the meeting logistics and travel and

accommodation information. Please keep in mind that you are required to file a 1099 for any speaker being paid an honorarium of \$600 or more.

### **Audiovisuals**

Almost all conferences use some kind of audiovisual aids. It may be as simple as a bulletin board or as sophisticated as communication via satellite. AV equipment is used to supplement a presentation, for entertainment, in place of a live presentation, and other purposes. If you plan to audiotape or videotape a presentation, you must obtain permission from the presenter. Determine what rental arrangements need to be made for AV. Take into consideration the physical size and aspects of the room. Always have someone check the equipment prior to the presentation.

### **Food and Beverage**

Most meetings have at least one food function, even if it's only a coffee break. Food functions have a psychological effect on the participants because it gives them an opportunity to get to know each other. It also provides participants with an opportunity to relax. Many hotels will comp meeting room rental if there is a food and beverage function affiliated with the event.

When negotiating the logistics of the food function, take into consideration whether tickets will be required; will there be a head table; will it be a banquet or reception style; is the food function scheduled during a break.

### **Exhibits**

Depending on the size of the meeting and the facility, you may wish to organize exhibitions. Exhibits can range from a literature table to a booth. As a supplement to the conference, the exhibition must be related to the conference and integrated with the theme of the meeting. Determine the space available; how applicants will be selected - typically first come first served; identify the logistics based on the floor plan; determine the schedule based on meeting breaks.

### **Marketing**

Marketing is essential to the success of a conference. Marketing has two purposes: the first is to attract the number of participants to reach your goal; and the second is to communicate the purpose of the organization. The way a conference is marketed reflects the image of the sponsor. Marketing materials also serve as a climate setting for the conference. A logo should be selected and reflected in all meeting materials.

Direct mail marketing is a major vehicle for advertising conferences. One way to get attention is to have multiple mailings. The timing is crucial. Try to schedule mailings so that it provides sufficient advance notice but does not conflict with other association activities, such as renewals. Email notices can also be a cost effective means of marketing an event.

Marketing pieces should include meeting specifics such as date, location, benefits, program content, cost, speaker information, hours of continuing education credit and registration instructions.

### **Registration**

Registration is frequently the first person-to-person contact between the participant and the conference personnel. The way the registration is handled sets the climate for the conference.

The goal is to minimize the time participants spend at registration. Provide ample opportunities to pre-register. Have the registration location easily identifiable and in a central location. Tie a service and information desk to the registration area. Provide ample staff - this is typically the busiest part of the meeting.

### **Continuing Education Study Groups**

Many constituents and components offer study groups to members as a way of facilitating continuing education. This has proven to be a valuable resource for members, as well as an attraction for prospective members.

## **Legislative Assistance**

Not every association plans to be legislatively active every year; however, it is always important to ensure your state association has a legislative team in place to lend a voice to dental hygiene as policy issues arise.

Becoming prepared begins with collecting some basic information and putting organizational structures in place. Most state presidents appoint a legislative chair to take the lead on advocacy issues and many states have a legislative committee in place to assist the legislative chair. The majority of state associations also have a lobbyist on contract to represent the association in legislative matters.

Gathering basic information, such as copies of your state practice act and rules, the administrative procedures and open meetings act, and the legislative goals from your state association's policy manual is a good starting point to understand the nuances of practice in your state. Understanding the policies and positions of other stakeholder groups engaged in oral health policy issues within your state is also helpful.

Understanding the national landscape of dental hygiene practice and the oral health delivery system is also important for state associations as they consider how to proceed on legislative matters. ADHA's Governmental Affairs Division has a number of resources designed to provide state associations and members with information about dental hygiene practice in each of the 50 states and the District of Columbia and information about federal policy initiatives. Much of the information can be obtained online, but additional resources are available by calling or e-mailing Governmental Affairs staff.

As part of the information gathering effort, state associations often develop a mechanism to monitor proposed legislation (often bill tracking is done through a state lobbyist) and designate a liaison to attend meetings of the state dental/dental hygiene board. Again, this is a function that is done by lobbyists in many states but some states do designate association members to attend and report on meetings. ADHA's website hosts a legislative tracking page that all users can access, but it is not intended to take the place of real-time tracking within your state.

Establishing a communications network to survey members on policy issues and offer updates as legislation and rules move through the political process is a critical. Providing information that lays out how policy issues impact dental hygienists and their patients and offering specific direction about how to get involved in the political process is vital to the success of an advocacy campaign. ADHA's Governmental Affairs Division offers all state associations the use of VOCUS, an electronic tool whereby states can customize timely e-mail messages to update members on legislative efforts and prompt political action (i.e. contact legislator). Phone trees, newsletters, and face to face meetings are other ways state associations can engage members. Your state may also want to consider devoting a section of its website to legislative activities so that members and other interested parties can obtain timely, easy to access updates on your association's advocacy efforts.

Associations have two main resources to draw upon in advocacy efforts -- members' time and expertise and association funds. When an association is not in a position to allocate a great deal of money for legislative activities, building the grassroots base becomes that much more

important. Grassroots political action which enlists large numbers of dental hygienists and issues stakeholders has been responsible for many successes dental hygienists have achieved in their state legislatures.

Coalescing with other organizations in your state interested in oral health policy efforts is another way state associations can be effective in generating grassroots support for legislative efforts. Patient/consumer organizations, groups focused on the underserved, and other professional organizations are all potential partners that lend strength and resources to advocacy campaigns.

Many state associations establish a political action committee (PAC) as an additional resource for engagement in the political process. PACs are subject to state campaign finance requirements and ADHA staff can assist states under locating information and resources to establish a PAC and maintain compliance.

Becoming actively involved in state and local campaigns is an opportunity to build relationships with state legislators and acclimate them to dental hygiene and oral health policy issues. Fostering professional relationships with legislators is critical and can have a significant impact on your state association's advocacy efforts.

To obtain additional information about legislative team building, or for assistance with your constituent or component's legislative planning, contact ADHA's Division of Governmental Affairs.

## **Public Relations**

Public Relations is basically telling the world who you are and what you do. A public relations program should be planned within the context of your association's strategic plan and should be used to support the goals of your association.

The first step is to set goals. Identify your target audience, anticipated outcomes, and communication tools. Then develop objectives that will serve as a road map for developing, implementing, and evaluating your association's public relations activities. The next step is to determine the public relations messages you wish to convey. Then select your communication tools, such as the association newsletter, brochures, radio, newspapers, speeches, and letters.

After selecting your communication tools you will need to decide on the style in which you wish to communicate. Electronic communication is the most popular way to communicate due to ease, speed, and cost saving factors. Once your style is selected whether it's electronic, hard copy or verbal it's time to implement your program. There are several avenues to convey your message.

### **Avenues of Communication**

#### Websites

The ability to provide members, consumers, and other dental professionals' access to the most current information about your association electronically is essential in today's world. Posting certain aspects of your association's business, highlighting upcoming events, Continuing Education seminars and community projects on your website can provide information, education, and convey the public image you wish to convey with ease. ADHA offers templates for webpage design in the Members Resource section on their website [www.adha.org](http://www.adha.org).

The addition of Podcasts, Facebook, and U-tube will also enhance your association's outreach and provide information in yet another format. Providing up-to-date information to the public is vital and using cost saving methods when possible is not only environmentally friendly, but financially prudent.

### Media Relations Program

Working successfully with the media begins with knowing who the players are. Spend time compiling a list of reporters who cover the stories that you wish to convey. Work one-on-one with reporters. Present the story from a consumer perspective.

### News Releases, Fact Sheets, and Position Statements

A news release is often the easiest and most cost-effective way to publicize your public relations activities. Send a news release only when the news is of interest to the community, it affects the lives of readers, or if it is of interest to one of your target audiences. Fact Sheets are more detailed versions of press releases that focus on a list of easy-to-understand facts. Position Statements should be used when you want to convey your association's formal stand on an important issue. ADHA furnishes up-to-date useful resources that can be accessed on their website for constituents and components to download and use.

### Public Service Announcements

Public Service Announcements are often the most valuable resource available to not-for-profit organizations because they use free air time on radio and television. PSAs are short, direct messages that promote public education rather than advertise services and products. ADHA offers a variety of PSAs with different timing selections for you to choose from on their website. Special messages for October's National Dental Hygiene Month, February National Children's Dental Health Month, and May National Seniors Dental Health Month are also available. Simply enter the information where instructed and send in to the radio or television stations. Remember, it is important to know who the station's listening audience is, and to direct your message towards them.

### Media Interviews

If you are fortunate enough to secure a media interview, it is a good idea to prepare with formal media training. Many constituents have an Area Media Spokespersons (AMS) committee where members practice public speaking. Participation in Toastmaster, whose clubs can be found in almost any city or town across the nation, also proves successful in building public speaking skills.

### National Dental Hygiene Month

Special events such as National Dental Hygiene Month in October offer perfect opportunities to promote oral health, your profession, and your association. Associations may also want to emphasize community projects and special events in February, National Children's Dental Health month and May, National Senior's Dental Health month.

### Public speaking Engagements

Public speaking is a fundamental component of a successful public relations program. It provides face-to-face contact with the public and allows for questions.

For ready to use information go to the ADHA website [www.adha.org](http://www.adha.org) and visit the Consumers

Press Room for the Latest News, Oral Health News, Fact Sheets, and Story Ideas. ADHA members may also want to visit the Members Only Resource area to utilize the PR Link and a variety of templates and printed materials designed for components and constituents.

## **Central Office Overview**

At ADHA's office, the association maintains several divisions that focus on your needs as a dental hygienist. The ADHA staff can provide information on issues affecting the dental hygiene profession, as well as answer your questions about ADHA activities and membership.

The Division of Communications provides members with the latest information affecting the dental hygiene profession through the *Journal of Dental Hygiene*, *Access* magazine, and ADHA's Website. It also coordinates public relations programs, including media relations, public awareness campaigns, and National Dental Hygiene Month.

The Division of Governmental Affairs monitors state legislative and regulatory trends as they relate to dental hygiene. In addition, the division works closely with constituents and components during legislative workshops that help local leaders develop skills for use in the legislative and regulatory arenas.

The Division of Member Services promotes the value of membership through regular communication with dental hygienists, students, constituents, and components. This division conducts membership marketing initiatives; manages the benefits programs; and serves as the primary resource on all aspects of membership.

The Division of Education promotes the advancement of dental hygiene education through collaboration with the dental hygiene and dental education communities of interest. The division provides support to the dental hygiene practice community; maintains a database of dental hygiene education programs; and interacts with other health professions, consumer groups, and health workforce agencies.

The Executive Office is responsible for a number of activities, including ADHA's Annual Session, policy information, scholarships, grants, and much more. It promotes the interests of ADHA before the U.S. Congress on matters affecting preventive dental health care and access to dental hygiene services.

The Division of Research promotes the implementation of the National Dental Hygiene Research Agenda; provides resource support through conferences and research, and interacts with other health professions and consumer groups.

The ADHA Institute for Oral Health administers a scholarship program for dental hygiene students. The Institute also awards grants to dental hygienists for proposed research endeavors.

# ADHA Resources by Division

## Executive Office

Association Policy Manual  
Annual Report  
Annual Session Information  
Bylaws and Code of Ethics  
Delegates' Manual  
Installation Ceremony Outlines

## ADHA Institute for Oral Health

Research Grant Program  
Scholarship Program Applications

## Communications Division

Access Newsmagazine  
Information Network  
Journal of Dental Hygiene  
Media Training  
National Dental Hygiene Month  
PR News & Media Report  
Public Relations Materials  
ADHA's Website

## Governmental Affairs Division

Building an Effective Legislative Team Manual  
Charts/Maps (multiple topic areas)

- 51 State Practice Act Overview
- Continuing Education
- Direct Access to RDH Services
- Direct Access Under Medicaid
- Licensure by Credential/Fees
- Local Anesthesia/Nitrous Oxide
- Self-Regulation/Board Representation
- Supervision Requirements
- Others...

Federal Advocacy Updates/Positions  
Guidelines for Association Lobbyist  
Health Services Occupations Information  
Independent Contracting/Practice Information  
Individual State Advocacy Planning/Strategizing  
Legislative Tracking (State and Federal) Online  
Legislator (State and Federal) Matching Lists  
Political Action Committee (PAC) Information  
Road to Self-Regulation  
State Practice Acts  
VOCUS Grassroots Software

## Member Services

Award Criteria and Applications  
J&J Award for Excellence  
Alfred C. Fones Award  
Irene Newman Award  
Student Member Community Service Award  
Graduate Transition Award  
*Spotlight*  
Constituent and Component Officer Workbook  
Constituent and Component Officer Information  
Guidelines for Constituent and Component Bylaws  
Insurance Brochures (Health, Liability, Disability, Life, Auto)  
Membership Mailing Labels and lists  
Membership Rosters via email  
Membership Applications and Benefits  
Membership Cards  
Membership Certificates  
Student Experience and Transition Programs  
Student Membership and Rosters  
Student Assembly  
Student Member Track at Annual Session  
Student Organizational Manual

## Education Division

Advanced Dental Hygiene Practitioner Competencies  
Standards for Clinical Dental Hygiene Practice  
CODA Information (Accreditation Standards for Dental Hygiene Education Programs)  
Dental Hygiene Education Program Listings  
JCNDE information (national dental hygiene board examination)  
Dental Hygiene Education Fact Sheets  
Summary of Clinical DH Licensing Examinations

## Research Division

Master File  
Database of the Following:  
Articulation Agreements  
Dental Shortage Areas  
Fluoridation Database  
Health Reform State Profiles  
Medicaid/Medicare Database  
National Association of Community Health Centers  
State Health Rankings

# Procedural Issues

Highlighted below is information about ADHA procedures that directly affect constituents and components.

## **Mailing List Distribution Tips**

To protect your association from potential liability issues, it is important to implement a formal policy for mailing list distribution. Some simple rules are:

- Always ask to review the materials associated with a request for mailing lists.
- Limit availability of the list to a single, one-time mailing only.
- Limit the use of the mailing list to the materials reviewed and not to allow use of the list to obtain telephone numbers.
- Include in a policy, that the list user not allow the list to be copied, reused, sold or used by anyone other than the approved requestor for any purpose other than that which was originally communicated to your constituent.
- Refuse access to your mailing list if you do not approve of the materials.
- Identify one person to coordinate all aspects of the mailing list approval and distribution process.

## **ADHA's Dues Billing**

ADHA's dues billing program is divided into two billing cycles, winter and summer. The dues period for the winter cycle was established by the Board as January 1 through December 31 and incorporates the months of October, November, December, January, February, and March. The dues period for the summer cycle was established as July 1 through June 30 and includes the months of April, May, June, July, August, and September. To facilitate the dues billing process, all constituent and component dues increases must be forwarded in writing to ADHA's Division of Member Services by March 31 for summer cycle billing and October 1 for winter dues billing cycle.

According to ADHA's Bylaws, "the membership of any member who is in default of payment of dues or assessments for more than three (3) months, ceases to be a member of the Constituent, Component, or other organization required for membership in the Association, or otherwise becomes ineligible for membership, shall be terminated automatically, according to such rules or procedures as the Board of Trustees or their designee(s) shall establish". A members' dues payment is due at the end of the dues billing cycle: March 31 for those on the winter cycle, and September 30 for those participating in the summer cycle. Members who have not paid by either of these dates are officially suspended for non-payment at that time.

Throughout the dues billing cycle, members are notified that their renewal is due. For example, during the winter dues cycle, first renewal notices are mailed in November and continue through February. Notices are then followed by telemarketing, emails and other notification. By providing them with advance notice, ADHA can assist members who need the time to plan their personal budget.

Members interested in switching dues cycles may do so by writing on their renewal notice their request to switch or by contacting ADHA directly. They will be required to pay the full amount at the time they receive the renewal notice. Then during the following dues cycle, they will receive

an invoice for six months dues.

### Quarterly Payment Plan - FAQ

- Q. When will the quarterly payment plan be available?
- A. The Quarterly Payment Plan is now available!
- Q. Am I eligible to be a part of the quarterly payment plan?
- A. Any licensed dental hygienist wishing to join ADHA as an "Active Member" or "International Member" is eligible to be a part of the quarterly payment plan. All current ADHA members can access the quarterly payment plan *ONLINE*.

**Please Note:** Any new, former or lapsed ADHA members will have to contact ADHA member services by phone to join the quarterly payment plan.

- Q. I am a current ADHA member, how do I access the quarterly payment plan?
- A. The quarterly payment plan is available online *ONLY* to current ADHA members. Current ADHA members will be able to access the quarterly payment plan "opt in" option within 90 days of their current expiration date *ONLY*. If you are a current member and wish to change your billing to quarterly you will need to follow the instructions below:
- 1) Log into your member only account by visiting: <http://www.adha.org/news/real.htm>
  - 2) Click the "Pay My ADHA Dues" link on the top right hand side of your profile
  - 3) Below your total dues you will see the option to "add to basket" – Annual Dues or the option to "add to basket" – Quarterly Payment Plan
  - 4) Choose "add to basket" – Quarterly Payment Plan
  - 5) Follow the steps to complete your check and you are all set!

- Q. Can I write checks to make my quarterly payments?
- A. No. The quarterly payment plan will be fully automated and electronic based only. This means that in order to participate in the quarterly dues payment plan the applicant must utilize a credit card only. Debit cards and checks will not be accepted. (Note: debit cards with a Visa or MasterCard logo may be used)

- Q. When will the quarterly payment plan be available for enrollment if I am a renewing Member?
- A. The quarterly payment plan option will be available to members for 90 days before the expiration date. So for the summer cycle, enrollment will be open from 4/1/yyyy-6/30/yyyy, and for the winter cycle enrollment will be open 10/1/yyyy-12/31/yyyy.

For example, if you are on the winter cycle, and pay your first quarterly payment, it will be applied towards the first quarter of the winter cycle (or January 1-March 31<sup>st</sup>). Or if you are on the summer cycle, and you pay your first quarterly payment in April, it will be applied to the first quarter of the summer cycle (July 1<sup>st</sup>-September 30<sup>th</sup>).

Any current member wishing to join the QPP who has missed their enrollment period

will be eligible to join the QPP in the following enrollment period only. These members will show a lapse in membership by doing so. To join the QPP and avoid a lapse in membership the member has the option to pay a cycle change payment (1/2 annual dues amount) to bring them current for the next cycle that will be open for QPP enrollment.

For example, if you call ADHA on March 1, 2010 to join QPP and you are an active renewing member with a paid through date of 12/31/2009, you will have to join the next QPP enrollment period which would be summer cycle. At this point your first payment will be processed 4/1/2010 for the period 7/1/2010 – 9/30/2010. Thus, your membership will show a lapse between 1/1/2010 – 6/30/2010. To avoid a lapse in membership you are able to make a cycle change payment for the six month lapse period that would be ½ of your annual dues amount.

Q. When can I enroll in the Quarterly Payment Plan if I am a New or Reinstating Member?

A. Anyone calling to join ADHA who is a Reinstating or New ADHA member may join the Quarterly Payment Plan at anytime.

Any new or reinstating member joining during an open enrollment period (4/1 – 6/30 or 10/1 – 12/31) will be enrolled and a charge will be reflected on their credit card upon sign up.

Any new or reinstating member joining the QPP outside of our two enrollment periods will be “floated” meaning their membership will become active upon enrolling in the QPP, and they will be placed in the next billing cycle (summer or winter). An active paid through date will not be officially recorded until the first payment has been made.

For example, if you call to join QPP as a new member on March 1<sup>st</sup> you will be enrolling outside of an enrollment period. The next QPP open enrollment period will be for summer cycle and enrollment will begin April 1<sup>st</sup>. ADHA will take your billing information on March 1<sup>st</sup> and you will become an active member right away. On April 1<sup>st</sup> your first quarter payment will be charged for the period 7/1 – 9/30. At that point your membership record will update and you will then officially have a membership paid through date of 9/30/2010.

Q. Are there transaction fees for the quarterly payment plan?

A. Yes. The Credit Card transaction fee is to be borne by the member and will be \$4 per transaction.

Also, members on the quarterly payment plan who drop membership and then reinstate in a subsequent quarter in that same annual billing cycle will be charged a \$15 processing fee.

Q. Will I still receive a plastic membership card?

A. No. Members on the quarterly payment plan will not receive membership cards, but will rather receive an email with a link to their print-on-demand membership card.

- Q. Will I still receive dues notices in the mail?
- A. No. Members will only receive electronic notices of payment due dates.
- Q. How will QPP members be counted for the state delegate count?
- A. Members must pay all four quarters of annual dues in order to be counted towards the state delegate count.
- Q. How will members on the quarterly payment plan track their "consecutive years"?
- A. Members must pay all four quarters of annual dues to be counted towards their "consecutive years".
- Q. When are members on the QPP dropped for nonpayment of dues?
- A. Members on the QPP will be dropped for non-payment of dues at 30 days.
- Q. Will I be automatically renewed on an annual basis on the QPP?
- A. Yes. Annual automatic renewal will occur for members who renew online unless the member specifies otherwise. Note: Members will receive an email pre-notification of annual renewal instead of a mailed dues notice.

The Division of Member Services processes all member dues payments, typically within a few days of receipt. If you have questions about payment options, please call the Division of Member Services.

### **ADHA Monthly Reports**

ADHA provides its constituents and components with reports to help you keep track of your membership.

On a monthly basis, constituent treasurers receive the Proof of Payment (POP) Roster (please note: component treasurers receive the POP quarterly). The report provides detailed information about the previous month's or quarter's membership payment activity. The POP roster provides information on all members who have paid dues for new, reinstated, or renewed members during the previous month. A check for the dues collected is enclosed with the roster (or direct deposited for states).

On a monthly basis, constituent membership chairs receive an alphabetical listing (Alpha Roster) of current members in their area. The names that appear on the roster are current members as of the date generated on the report. Thus, some members might be listed whose dues have not yet appeared on the POP roster.

Reports may be requested of the Member Services Division at any time.

### **Understanding POPs and ALPHAs**

For those of you who regularly receive POP (Proof of Payment) reports and Alpha rosters from

central office (typically Membership Chairs and Treasurers), following are a few tips in deciphering them:

- Our database is “live”. This means that when we run reports, we’re effectively taking a snapshot of the data at that moment in time. So if we haven’t run a report previously on a specific date, the data will not be available.
- Constituents and Components may receive the POP report monthly and bi-monthly Alpha roster via email upon request (limited to 2 email addresses per Constituent/Component) as well as hard copy via USPS.
- Electronic reports can be opened by most spreadsheet programs so that the data can be utilized. Please note that we strongly recommend familiarity with Excel so you can maximize your use of the data.
- Custom reports are available! If you’re doing a specialized mailing or email blast, we’re happy to work with you
- POP Reports:
  - Detail activities for the previous month
- Are e-mailed monthly to states around the 15<sup>th</sup>
- Alpha Rosters:
  - List all **active** members
  - Are e-mailed every month with the POP report
  - Identify new members by an (N) next to the ID number
  - Identify reinstated members by an (R) next to the ID number

Questions should be directed to the Division of Member Services.

### **Delegate Count for Annual Session**

The delegate count for ADHA’s House of Delegates is determined each year based on the number of voting members (Active, Life, Retired/Senior, and Members with Disabilities) on June 30. The total excludes the following individuals: new members on the Summer Cycle; reinstates on the Summer Cycle; and June graduates who have recently paid Active Membership dues. These members are not included because their membership dues became effective July 1.

## **Administration Policies**

To ensure effective administration and communications, ADHA has developed policies for the establishment, administration, and maintenance of Constituent and Component Organizations\*. ADHA’s Board of Trustees will interpret and modify these policies, as necessary. ADHA’s organizational structure is based on a Tripartite System of governance whereby it is required that all voting members be members of ADHA, their constituent organization, and a component organization (if one exists in their geographic area) and whereby all membership categories in the Tripartite System are identical. Following are the Constituent and Component Organization Administration Policies that include supplemental information.

### **Charters**

Charters for the operation of Constituents may be revoked by the Board of Trustees at any time and in such manner and after such investigation as the Board of Trustees may deem necessary. Upon revocation of a Constituent’s charter, the Constituent immediately shall remit all of its funds and records to the Associations Executive Director.

Due notice shall be given by the Board of Trustees to the Constituent in question, by registered mail and reasonable opportunity shall be allowed for the Constituent to meet the requirements or correct infractions before final action is taken to revoke the charter.

## **Membership**

The membership categories for a Constituent or Component Organization shall be consistent with ADHA's membership categories.

## **ADHA/Constituent/Component Relations**

### Purpose

The purpose of ADHA's Constituent and Component Organization program is to assist ADHA in carrying out its mission at the state and local level and to:

- enhance coordination and communication among dental hygienists at various levels;
- avoid fragmented efforts or inconsistent approaches on matters of common concern;
- improve efficiency and conserve resources by eliminating duplicative efforts; and
- respond to the increasing significance of state and local issues affecting oral health, the art and science of dental hygiene, and the dental hygiene profession.

### Dues Collection

ADHA shall collect dues from each of its Members for their membership in ADHA, the Constituent, and the Component, if any. ADHA shall remit to the Constituent and the Component that portion of the dues applicable to their respective Constituent and Component memberships.

### Constituent Annual Reports to ADHA

Each Constituent Organization shall provide the following information annually to ADHA (see the following section for instruction):

- calendar of meetings and all meeting notices
- IRS Form 990
- budget, including dues structure
- up-to-date copy of bylaws
- current list of officers and directors
- other information that ADHA may require from time to time

All constituent annual reports must be submitted electronically, compiled by staff and available to constituent leaders throughout the year when they visit the Member's Only section of the ADHA web site.

To access the form and submit your report:

1. Go to [www.adha.org](http://www.adha.org) and log into the member web section.
2. Click on Member Resources.
3. Go to Constituent & Component Resource Center. Click on (browse resources).
4. Scroll down to CLL/Annual Session '09.
5. Click on ADHA constituent Annual Report form (first item)
6. Open the form and save it to your computer so that you can complete it over time.
7. Complete the form.
8. Email the form to [karenc@adha.net](mailto:karenc@adha.net) by Monday, June 1.

The compiled reports will be under the constituent and component resource area of the web site after June 15.

### Publicly Stated Positions

A Constituent or Component Organization may not act for or represent ADHA without the express written approval of ADHA's Board of Trustees. Only the ADHA Board is empowered to take positions on substantive national issues affecting dental hygiene. When meeting with the public, public officials, private industry, or the media, Constituent or Component Organizations' authorized representatives may state official ADHA positions, as adopted and approved by ADHA's Board of Trustees. Constituent or Component Organizations may not otherwise make statements on behalf of ADHA.

### Contracts

Constituent or Component Organizations may not bind ADHA to any contract, written or oral, express or implied. In entering any agreement, the Constituent or Component must specify that it is acting on its own behalf. Under no circumstances may ADHA's name be used to secure loans or credit, nor may ADHA be bound in any way by such agreements.

### Use of ADHA Name and Logo

Constituent and Component Organizations and all of their members shall abide by ADHA's rules governing the use of ADHA's name and logo. No alteration of the logo is permitted, nor may the logo be used in connection with other symbols or logotypes so as to constitute a new logo. Further, no Constituent or Component may use the name of the Association in any manner whatsoever unless duly authorized to do so by the Association pursuant to the terms of a written agreement. *Note: please see the Branding section for further information on logo use.*

### Bylaws Guidelines

Although state law takes precedence over these guidelines, it is important that ADHA constituents not be in conflict with the bylaws of the parent organization. Therefore, these guidelines and model bylaws have been developed to ensure that constituents and components are in compliance with the bylaws of the American Dental Hygienists' Association.

- I. Constituents that are incorporated are governed by the not-for-profit corporation laws of the state in which they are incorporated. As such, prior to adopting or revising its bylaws, a constituent should consult the laws of the state under which it is incorporated. In most cases, these laws are governed by the Secretary of State or Commonwealth and information may be found on their respective websites. [Please note that in Alaska, Hawaii and Utah the laws are governed by the Lt. Governor.]
- II. Regarding Article I, Name and Purposes, a constituent may individualize its bylaws to reflect its purposes and mission, providing they are not in conflict with the purposes and mission of ADHA. The purposes of the constituent must be focused on the state association. Goals do not necessarily have to be included in the bylaws. If they are, it is logical for constituent goals to reflect the nature of a state organization.
- III. Regarding Article II, Membership, only the voting and non-voting membership categories must be identical to ADHA's, with the exception of Life Membership. In some cases, a state may have granted an individual life membership. However, that individual may not be a life member of ADHA and be required to pay national

dues. In other cases, such as in past ADHA Presidents, a member may have life membership on the national level but not on the state level.

If a dental hygienist meets the criteria for any one of the voting membership categories, that dental hygienist cannot be placed in a non-voting category. Privileges of membership may be adapted to the constituent. The remaining sections in this article should mirror the intent of those of ADHA, with the addition that the constituent should also be notified of a member's resignation. It is understood that constituents may establish the amount of dues.

IV.Regarding Article IX, Committees/Councils/Task Forces, Constituents do not have to list the committees in their bylaws, but if they do, it's important to detail their respective responsibilities as they vary from committee to committee. For example, a Constituent may not have a Finance Committee because their Executive Committee handles those responsibilities.

V.Regarding Article X, Constituents and Components, this should mirror the language set forth in the guidelines. Constituents charter and have responsibility for Components, as national does for Constituents.

VI.Article XVI, Amendments, this should be similar to that of ADHA, but notice of intent, etc., should be submitted to the constituent or component president or executive director and the time frame can be suited to the constituent calendar.

VII.Regarding Article XVII, Dissolution, this must mirror the language set forth in guidelines and be in compliance with federal and state laws.

VIII.Regarding Article XIX, Supremacy Clause, this must be used as set forth in the guidelines.

Two documents have been developed to assist states with revising their bylaws. The first document is entitled "Constituent Bylaws Guidelines: Check List and Sign Off". These guidelines and checklist indicate the specific areas that must be in compliance. The second document is entitled "Constituent Model Bylaws" and may easily be adapted to respective states.

The ADHA Bylaws, Constituent Bylaws Guidelines: Check List and Sign Off, and the Constituent Model Bylaws may all be found on the ADHA home page ([www.adha.org](http://www.adha.org)) under "About ADHA".

Once your constituent has adopted revised bylaws, a hard copy should be submitted to the Director of Member Services no later than sixty (60) days after their enactment. They will be reviewed to ensure compliance and will be placed on file.

Questions should be directed to the Division of Member Services, 312/440-8900, ext. 1.

# ADHA Contact Information

Phone #: 312/440-8900

- #1 Member Services
- #2 Order Processing
- #3 Governmental Affairs
- #4 Communications
- #5 Education and Research
- #6 Institute for Oral Health
- #7 Executive Office

Fax: 312/467-1806

Website: [www.adha.org](http://www.adha.org)

Email: [mail@adha.net](mailto:mail@adha.net)