



American
Dental
Hygienists'
Association

Operating Guide

*Everything You Need to Know About
State and Local Operations*

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 states, over 350 local components, and in several foreign countries. Approximately, 35 staff members service ADHA members from the office in Chicago, Illinois.

Constituent (state) and component (local) organizations play an important role in meeting the needs of members. 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 guide to facilitate such responsibilities.

This guide provides state and local organizations 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 state and local 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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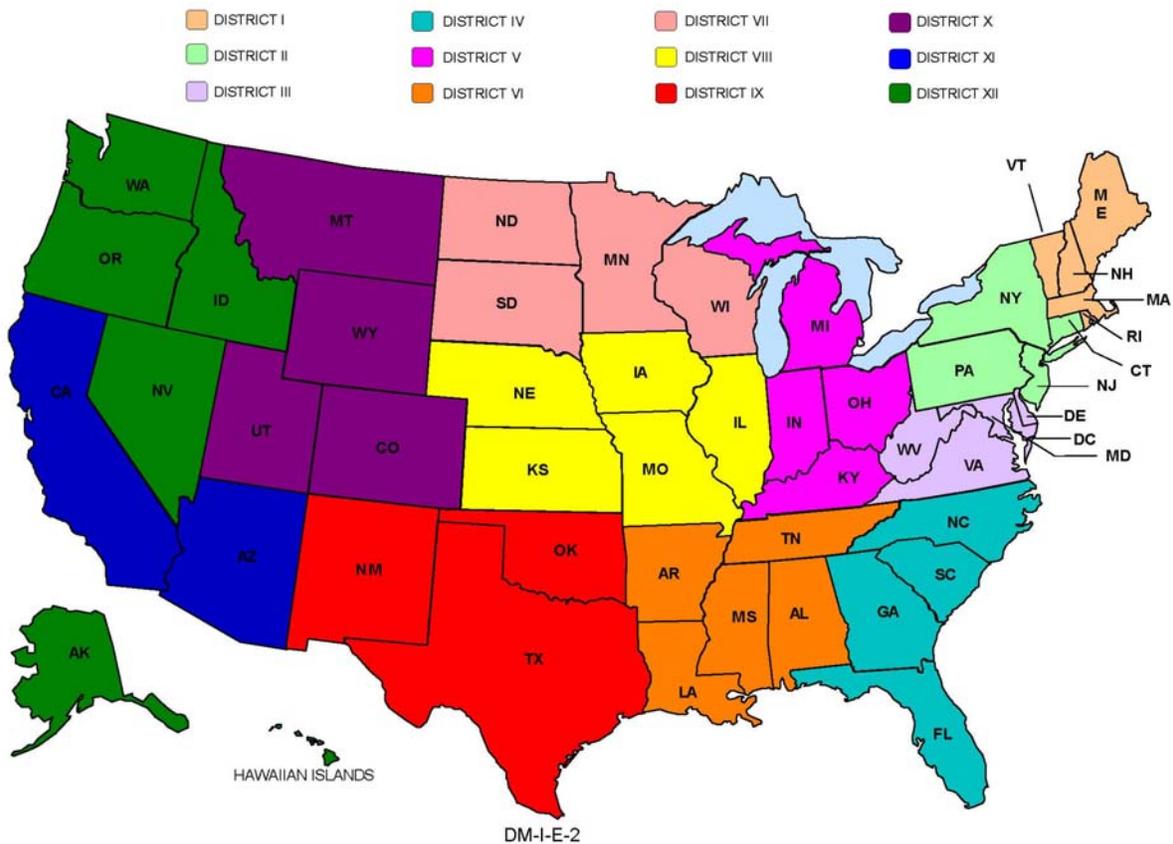
Leadership

ADHA District Structure

The states 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 state and local organizations 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 states; 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 state and local organizations through the District Trustee, during the fall, winter, and Annual Session Board of Trustees Meetings.

ADHA DISTRICTS



What is YOUR Fiduciary Responsibility as a Board Member?

"Fiduciary" is a legal term that refers to a relationship where an individual, or board, is holding something in trust for another. A nonprofit's Board of Trustees has ultimate responsibility and accountability to the public for the organization's actions. Fiduciary duties ensure a board acts in the nonprofit's best interests and works to fulfill the nonprofit's tax-exempt mission and maintain its tax-exempt status.

Board of Trustees (or Board of Directors) has THREE fiduciary duties:

1. Duty of Care
2. Duty of Loyalty
3. Duty of Obedience

1. Duty of Care

Requires competence in performing directional functions

- Must use care "a reasonably prudent person would exercise in a like position and under similar circumstances"

Requires that directors:

- Act in good faith
- Participate in meetings
- Be prepared (*e.g.*, read reports)
- Ask questions when necessary
- Exercise independent judgment
- Delegate to staff and committees
- Rely on the advice of third parties (*e.g.*, attorneys, accountants)

2. Duty of Loyalty

- Requires faithful pursuit of the interests of the organization (rather than the financial or other interests of the director, or another person or organization)
- May not use position, or information gained from participating on the board, to secure a personal benefit
- Must disclose actual, potential, or perceived conflicts of interest
- Must abstain from participating on such matters
- Must maintain confidentiality of board discussions

3. Duty of Obedience

- Requires faithful pursuit of organization's mission and decisions (within the bounds of law)
- Must abide by the organization's rules and policies
- Must support, help implement, and avoid undermining the board's decision

As part of these duties, Trustees must also:

- Adopt and adhere to a conflict of interest policy
- Adopt and adhere to codes of ethics for directors and staff
- Establish effective internal financial and accounting controls
- Ensure that the board understands and can fulfill its financial responsibilities
- Conduct independent financial reviews, including audits
- Ensure the accuracy of Form 990 disclosures
- Adopt a policy on reporting/responding to suspected misconduct or malfeasance
- Ensure adequate employment policies
- Promote a culture of accountability and transparency
- Determine and follow the organization's mission and purposes
- Establish policies and delegate implementation
- Disclose conflicts of interest
- Maintain confidentiality
- Attend board meetings regularly, read reports, and, as questions arise, make reasonable inquiry
- Manage the organization's financial resources effectively
- Develop leadership and appoint board committees
- Seek outside professional advice where necessary
- Ensure effective organizational planning
- Determine mission related goals
- Select and support the CEO, Lobbyist, Executive Secretary, etc.
- Enhance the organization's public image
- Manage the organization's financial resources effectively
- Resolve issues that cannot be handled elsewhere
- Assess the staff and the board's performance (which may be different)
- Understand statutory requirements for board meetings and voting procedures
- Follow requirements for taking board action without a meeting (no proxy voting)
- Understand the use of executive sessions
- Draft meeting minutes that include only action items, not extraneous discussions
- Disclose and address potential conflicts of interest
- Understand your organizations legal status:
 - Understand the hierarchy of governance documents (Corporate statute, Articles of incorporation, Bylaws, Policies)
- Recognize that changes in governance documents can have upward and downward impacts
- Assure periodic review of governance documents (e.g., bylaws, articles, policies) to:
 - Make sure your organization is acting in compliance and is up to date with current practice
 - Take advantage of updated laws
 - Modernize and streamline
 - Maintain appropriate division of authority: Members, House of Delegates, Board of Trustees, Committees, Officers
- Understand role and responsibilities of board and officers

More information may be found on board member's fiduciary responsibilities at www.boardsource.org

Understanding Collaborative Leadership

Collaborative leaders engage people and groups to work toward common goals that rise above their traditional roles, disciplines and past experience and beliefs. They focus on competencies not work scope, position or experience. And leaders must take a team-based approach to complexity, coordination & innovation.

"Getting value from difference is at the heart of the collaborative leader's task... they have to learn to share control and to trust a partner to deliver, even though that partner may operate very differently from themselves"

Archer, David; Cameron, Alex (2008). *Collaborative leadership – how to succeed in and interconnected world*

Hank Rubin author and President of the Institute of Collaborative Leadership has written "A collaboration is a purposeful relationship in which all parties strategically choose to cooperate in order to accomplish a shared outcome." In his book he asks "Who is a collaborative leader?" and answers:

"You are a collaborative leader once you have accepted responsibility for building - or helping to ensure the success of - a heterogeneous team to accomplish a shared purpose".

Qualities of a collaborative leader:

- Willingness to take risks
- Eager listener
- Optimistic about the future
- Able to share knowledge, power and credit
- Find ways of simplifying complex situations for your people
- Prepare for how you are going to handle conflict well in advance
- Recognize that there are some people or organizations you just can't partner with
- Have the courage to act for the long term
- Invest in strong personal relationships at all levels
- Inject energy, passion and drive into your leadership style
- Continually develop your interpersonal skills, in particular

References:

Kanter, Rosabeth Moss (2003). *Rosabeth Moss Kanter on the Frontiers of Management*. Harvard Business School Press.

Chrislip, David (2002). *The Collaborative Leadership Fieldbook - A guide for citizens and civic leaders*. Josey Bass

Archer, David; Cameron, Alex (2008). *Collaborative leadership – how to succeed in and interconnected world*. Butterworth Heinemann

Rubin, Hank (2009). *Collaborative Leadership: Developing Effective Partnerships for Communities and Schools*. Corwin Press

Disclosure Documents

In the addendum is the ADHA Leadership Values Agreement that the Board of Trustees adopted that is an excellent document for your respective boards to discuss. Also are ADHA's Conflict of Interest Policy and Rules of Conduct. At the beginning of every fiscal year

have volunteer leaders sign off on these types of disclosure documents and include it as an agenda item at the beginning of every business meeting, so that it will be documented in the minutes as well.

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.

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. District Trustees are a great resource for this process.

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

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

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.

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 – may consist of a president, immediate past president, vice president, treasurer, membership chair, secretary, and possibly committee chairs.
- Committees – 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 – 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 addendum for sample agenda.)

Use a Consent Agenda - Often, meetings are the only time when the board as a whole gets together to execute its *governing* responsibilities and time is limited.

A consent agenda can turn a board meeting into a meeting of the minds around the things that matter most. A consent agenda is a bundle of items that is voted on, without discussion, as a package. It differentiates between routine matters not needing explanation and more complex issues needing examination. While not difficult to use, a consent agenda requires discipline in working through the following seven steps:

1. Set the meeting agenda
2. Distribute materials in advance
3. Read materials in advance
4. Introduce the consent agenda at the meeting
5. Remove (if requested) an item from and accept the consent agenda
6. Approve the consent agenda
7. Document acceptance of the consent agenda

With a consent agenda, what might have taken an hour for the board to review, takes only five minutes. Because it promotes good time management, a consent agenda leaves room for the board to focus on issues of real importance to the organization and its future, such as the organization's image and brand, changing demographics of its states, or program opportunities created by new technology. To read more on Consent Agendas, go to www.BoardSource.org.

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 state and local organizations may summarize the meeting in the form of a report for historical files. (See addendum for sample minutes.)

Utilize the latest technology for your meetings! - Conference calls, web-based meetings like WebEx, Skype, 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*.

Please see the Addendum for the basic criteria for using parliamentary procedure when conducting business.

Financial Issues

Overview

As a professional association, a state or local 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 state or local, 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. Keep in mind that it is impossible to indentify all of the issues that a state or local 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 state and local organizations, financial policies are set by one of three groups, and in some cases, especially with states; 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.

State and local 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 state or local 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 state and local 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 state and local organizations is "Can I use ADHA's tax

identification number?" The answer is no.

State and local organizations are not a part of ADHA in a tax sense. Therefore, each state and/or local 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 state or local 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.

Tax-Exempt Status

There are many different types of tax-exempt organizations. Although the Internal Revenue Code recognizes numerous types of tax-exempt organizations, state and local organizations 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 state and local organizations 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), state and local organizations 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 State and Local 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, state and local organizations 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 states 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 state also must annually file a list of its qualifying tax-exempt locals. Please note: a user fee of \$3,000 is required with all requests for group exemption.

In this scenario, the state essentially attests in a listing with the IRS that its affiliates (locals) qualify as tax-exempt organizations, which in turn relieves the IRS of its obligation to independently evaluate the tax-exempt status of each local. The principal advantage of group exemptions is that each local 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 state would submit a letter to the IRS on behalf of itself and its locals 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 locals 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 locals are as described
- A statement that each local to be included in the group exemption letter has furnished written authorization to the state
- A list of locals 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 locals 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, 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 state and its locals qualify for tax exemption. Once the IRS grants the exemption, the state is responsible for (1) ensuring that its current locals continue to qualify to be exempt; (2) verifying that any new locals are exempt; and (3) updating the IRS on an annual basis of new locals, locals no longer to be included, and locals 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: locals that have changed their names or addresses; locals no longer included; and locals that have been added. Each list must show the names, mailing address (including zip code), and employer identification numbers of the locals.
- The same information about new locals that was required in the initial request.

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

For many locals, filing for tax exempt status is a lengthy and expensive process that they are unable to do. Therefore, ADHA recommends that states file for group exemption for those locals that are unable to complete the process on their own. We hope that this recommendation streamlines and facilitates the locals' 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

- 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 must file 990-N (e-postcard)
- Tax exempt organizations with gross receipts greater than \$50,000 but not more than \$200,000 AND with assets less than \$500,000 may file the Form 990 EZ
- Form 990 must be filed if exceed gross receipts of \$200,000 and have assets greater than \$500,000.

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.

Go to www.irs.gov for further information.

Incorporation

What is "incorporation"? Incorporation is the process of creating a legal entity under authority granted by a state. The Internal Revenue Service can grant only nonprofit organizations an exemption from federal income tax, but incorporation is not required for an organization to be considered tax-exempt by the IRS.

The positives of incorporation:

- A primary benefit of incorporation is that it protects individual officers and members from personal liability when conducting activities on behalf of the state or local. Also, state law typically offers protection from personal liability for officers of incorporated associations.
- Liability insurance can be purchased whether incorporated or not – but it is more difficult to purchase if unincorporated.
- An incorporated state/local can sue and be sued in its corporate name, while an unincorporated state/local must appear in court in the name of participants (officers and members).
- Vendors are somewhat unwilling to enter into contracts with unincorporated associations because the entity that they are dealing with is always in flux.
- State corporation laws provide clear guidance to incorporated associations regarding organizational structure, voting and other matters.
- An incorporated association's liability for federal and state income tax is usually limited to corporate assets, while members of an unincorporated association could be personally responsible for income taxes. Note: a tax-exempt organization is exempt from federal and state taxes on income derived from activities substantially related to the organization's tax-exempt purposes, but is still subject to sales and use taxes,

real estate taxes, personal property taxes, payroll taxes, unrelated business income taxes, lobbying taxes and other state and local taxes.

ADHA strongly recommends that states be incorporated, but recognizes that locals must weigh the benefits of incorporation against the costs.

Lastly, all states are required to adopt bylaws consistent with ADHA's bylaws and to comply with the bylaws, policies and procedures of the organization. These requirements apply regardless of whether or not the state is incorporated.

Unrelated Business Income Tax (UBIT)

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 (UBIT) 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 UBIT.

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

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*. NOTE: Organizations that report more than \$1,000 of UBIT on their Form 990 but have not filed Form 990-T may receive an inquiry from the IRS and could be subject to audit.

Taxes for Employees

For those state and local organizations 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.

Filing the 1099 Form for Independent Contractors

For those state and local organizations hiring speakers, web designers, lobbyists, etc. (any non-employee compensation) making \$600 or more, a 1099-MISC must be filed with the IRS. Following are the due dates:

Due Date to IRS (unless indicated otherwise): February 28th*

Due Date to Recipient (unless indicated otherwise): January 31**

For more information, go to www.irs.gov

Income

Member dues are collected by ADHA. State and local organizations 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 State and Local Organization is solely responsible for its own debts and liabilities, and for fulfilling all requirements imposed by government authorities, including reporting and tax requirements.

Organizing Volunteers

Your volunteers are the heart of your project.

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.
- Consider creating jobs or tasks rather than always a 'position'.
- *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.
- *Use Co-Chairs.* It is always good practice to think about what positions are ultimately needed to run your organization. Consider eliminating those positions you don't use or combining several into one. Several states have found co-chairs to be a positive change for their organization and a tool to retain volunteers. This is also a great way to match up a student with a more seasoned member to split a role.

All state and local organizations 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.

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, state and local logos) all mailings, emails, the website, etc.
- Use the new brand logos developed for the states (and we can customize these for locals as well.)

ADHA's logo is a trademark and the property of ADHA. However, ADHA grants license to state and local organizations 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.

Direct Mail and Email Communications

One important aspect to ensure a successful brand is to use consistent messaging and logos throughout all communications sent to either current or prospective members whether it is via email or direct mail.

There are a number of options available when selecting how your state and/or local will use mass email communications. Options include setting up a distribution list within your existing email account to creating customized, brand friendly and professional looking emails or newsletters by using HTML and custom templates through third-party companies. A number of companies offer solutions to help your association connect with members. Constant Contact is one company that allows clients to upload a member list online and send emails through their system and server. Another solution is to use the same company that ADHA uses for emails and newsletters – Informz. ADHA has arranged for states to use a co-branded email blast template at a discounted rate. Once your account is set up, you can send to a list that pulls live from ADHA's database. We can help get your account set up

through our own personal e-Marketing advisor. Another great benefit with Informz is the reporting capabilities including how many times the mailing was opened, who opened it, how many times specific links were clicked and much more!

Direct mail is also a highly effective communication tool. Programs such as Microsoft Word allow users to easily create custom mailings through their 'mail merge' tool. This feature allows users to create unique documents by using excel documents to pull specific information such as first name or a members ID number into the documents. For more information on the tool and guide on how to set it up, visit <http://office.microsoft.com> and search for 'mail merge'.

Membership Recruitment

How to Implement a Campaign

The key to an effective membership campaign is to have a 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 locals 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 locals and the state 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 local and state implement campaigns with the same goals. Provide each other with the campaign goals and objectives; membership committee contact information; and a schedule. With the state and local organizations 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 state and local 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 goals and how they fit into those of the state. 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 state and local organizations 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, state, and local membership. If you are not clear about the benefits at the state and local levels, contact your state or local 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 state and local 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. ADHA offers a display unit that can be shipped to you for use at your event. This table top is available (based on availability) by contacting Member Services. It is recommended that requests be submitted as early as possible to ensure that a display will be available for your event.
- Send invitations to prospective members encouraging them to attend meetings. Offer first-timer orientation sessions prior to state and local 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 state 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:

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

- Make the difference between your non-member and member cost of a CE session or annual session equal the cost of membership. You can then offer a “free” membership to those non-members who join on the spot at your meeting or event.
- 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 locals 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 local presidents list of licensees for follow up.
- List your state’s phone number in the yellow pages.
- Insert application in your organization’s newsletter, if mailed to all dental hygienists.

Membership Benefits

ADHA offers a wide variety of benefits specifically designed to help better Empower, Support and Develop its members. ADHA has partnered with several companies, 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 and for the latest information go to: <http://benefits.adha.org>.

A comprehensive listing and information on how to redeem the benefits can be found by logging into your member’s only account and clicking on the member resources page.

Membership Categories

Voting and non-voting membership categories must be identical to ADHA’s.

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 (state) as well as a Component (local) (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 State and/or Local, 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 State as well as a Local (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 state/local 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 Education 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 state and local organizations 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 state and local organizations 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.

All Things Students!

Student outreach is a key local 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 focus 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 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 local board in an honorary position. This position would demonstrate to the student the importance of association membership while developing future leaders for the local and state.

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 local 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 states during past Membership Networking Sessions:

- Send state or local newsletter to dental hygiene programs.
- Offer state/local 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 state Annual Session free of charge.
- Offer Outstanding Student Award to the student who has become actively involved in the student member group, local, or state.
- Offer awards for books for first year students and free membership for graduates who become involved in local or state activities.
- Offer scholarships to local student members who are active in local.

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.

Please see the addendum for a sample panel discussion and communications calendar.

Create a career panel and include hygienists from a variety of work settings. Use the panel to introduce students to the opportunities that are available to them as hygienists. If a panel is not conducive, use ADHA's Environmental Scan to hold a discussion about the future of the profession and their careers.

Please see the addendum for a sample panel discussion and communications calendar.

Student Leadership Opportunities - Student Delegate and Alternate Delegate

While all student members of the American Dental Hygienists' Association are invited to attend the association's Annual Session in June each year, ADHA offers a leadership opportunity for students through the Student Delegate and Alternate Delegate roles. Students wishing to apply for this position will need to complete an application. This application can be found in the student section of the ADHA website. The student will submit the completed application to their District Trustee. The Trustee will then choose one student delegate and one alternate delegate to attend CLL at Annual Session.

The 24 student delegates/alternate, two from each district, chooses one voting student delegate and one reporting student delegate. The voting student delegate has the opportunity to vote during the House of Delegates. The reporting student delegate gives a report to the House of Delegates on the Student Mega Issues discussion. Student delegates/alternates are provided with travel and lodging as well as a daily food allowance.

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.

Transitioning

Students with a current student membership during the year of their graduation are eligible to transition their student membership to Active Membership by giving their license number to ADHA.

Students who graduate before July 1st have until December 31st to transition their membership at no additional cost. Graduates who fall into this category, and most do, will receive a notice to renew their Active Membership in the winter cycle of the year they graduate.

Example: A student graduating on 5/2012 has until December 31, 2012 to transition their membership at no additional cost. Once their membership has been transitioned, the student will receive a notice during the winter of 2012/2013 to renew as an Active Member.

Students who graduate after July 1st have until June 30th of the following year to transition. After transitioning, these students will be placed on the summer cycle.

Example: A student graduate on 10/2012 has until June 30, 2013 to transition. Once their membership has been transitioned, the student will receive a notice during the summer cycle 2013 to renew as an Active Member

ADHA communicates with students and student advisors by email, e-newsletters, social media and publications to encourage transitioning.

Fundraising

Fundraising is one of the most challenging responsibilities of a local, 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. Lastly, be sure to 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 states and showcasing community responsibility at local levels.

To successfully garner corporate funding for state 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 state 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:

- A meeting coordinator and committee are selected
- Meeting goals are established
- Responsibilities are assigned
- A site is selected
- Presenters/speakers are selected
- Conduct marketing and public relations to promote meeting
- 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 state and local organizations 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

Advocacy for the profession is one of the major functions of any professional association. Better together is more than a slogan—effective advocacy is many coordinated voices speaking together. In the world of dental hygiene, where so many aspects of practice are

governed by statutes and rules, this frequently means legislative and regulatory advocacy. So it's not surprising that virtually every state association has a legislative chair and usually a legislative committee. The service of a lobbyist to work with the committee can be indispensable and a state political action committee (PAC) is an important addition as well.

The association House of Delegates and/or Board of Trustees are responsible for developing an advocacy agenda as part of the association's strategic plan. The legislative committee is a standing committee of the association appointed by the President. Its' function is to provide direction and oversight concerning legislative, regulatory and policy making activities in the state.

Regardless of how active the association intends to be in advancing an advocacy agenda, following are the minimal responsibilities that every committee needs to address. Politics is an active environment where things may not happen on the association's timetable. It is necessary to have some basic assets in place so that the association is able to represent the dental hygiene community whenever it is required.

Be a Resource on the Practice Laws

- There is easy access to the statutes and regulations governing dental hygiene on the dental board web site.
- The committee should also be aware of basic rules concerning the operation of the dental board. Every state has an "administrative procedures act" that governs the process that boards must follow to make rules, the process for suggesting new rules to the board, and similar matters.
- Governmental Affairs is available to assist the association in locating these and any other laws/rules.

Be a Resource on Political Activity in the State

- Monitor the introduction and progress of any legislation of concern to dental hygiene. State lobbyists will also subscribe to a service to monitor legislation. Your state legislature may have a sign up service that allows individuals to identify and follow the progress of bills that contain whatever topics or key words that you identify. ADHA identifies and tracks legislation in every state that affects dental hygiene and provides this information continually updated online at www.adha.org
- Monitor the activity of the dental board. The dental hygienist(s) on the board represent larger interests of the public so the association needs to arrange to have one or more members attend board meetings to report back and coordinate representing the associations' position.
- Maintain a visible public profile for the association in the legislature. Hold an annual lobby day to visit legislators. Look for non-controversial legislation to contact legislators about (Medicaid reimbursement rates, scholarships for health care professions students). Fostering professional relationships with legislators is critical and can have a significant impact on your state associations advocacy efforts.
- Maintain a profile with other oral health stakeholders. Locate any "official oral health coalition" and become part of the coalition. Most states have this kind of coalition that is connected with the Department of Health. There may be other groups of stakeholders who are active in oral health issues. You need to identify these groups and reach out to them as well.

Have a Working Relationship with a Lobbyist and State HYPAC

- A lobbyist is a window and a line of communication to the legislature that is impossible to replicate. While the association needs to carefully manage resources, a relationship with a lobbyist is a form of political survival insurance the association cannot afford to overlook.
- Most states have established a State HyPAC as well. A PAC is a political action committee whose purpose is to donate to election campaigns. The PAC is a separate entity which is “connected” to the association and draws its membership from the members of the association and its leadership from association leaders as well. The PAC goals are to support candidates whose positions on oral health issues coincide with the positions of the association. For more information about organizing and running a PAC, contact Governmental Affairs.

Keep in Touch with the Grassroots

- Ultimately the effectiveness of the state’s advocacy grows out of the interest and efforts of the grassroots—so it’s always a good idea to keep the grassroots in the loop. One way to do this is to have a legislative page on the association web site. Include news about the associations’ initiatives, and news about other developments in the state of interest to dental hygienists. It is also helpful to be sure there are links to the practice act and rules and any other items of interest pertaining to dental hygiene regulation. Check out sites that other states have put up for ideas that you like.

Available Staff Support

- One of the most important responsibilities of Governmental Affairs is to support state advocacy to achieve state political and policy goals. Staff is available to review or draft legislative and regulatory language, discuss strategy, help develop fact sheets and other materials and provide research materials and information from other states.
- There are three special services available to you as well. Through the VOCUS communications system staff can broadcast a state association’s legislatively related email, designated as from the state association, to member and non member hygienists. VOCUS also will create lists that match members to their legislators. The third service is online legislative tracking at www.adha.org. At this location you can read and track the progress of all pending state legislation that pertains to dental hygiene, dental and oral health issues.

To obtain additional information about legislative team building, or for assistance with your state or local legislative planning, contact ADHA’s Division of Governmental Affairs.

Managing Independent Contractors

How to Manage an Independent Contractor

Following are some best practices for when to retain and how to manage an independent contractor. In today’s freelance culture, independent contractors can be an integral part of

states/locals' success. And contractors can fill a diverse slate of positions, from legal consultants, lobbyist, and association management support to Web designers.

Before your Board or Executive Committee start the search for the contractor – or even put out feelers – clearly define what services will need to be provided. Draft something of a job description that can serve as a reference point in drawing up a contract. It should include specific tasks to be accomplished – say, for a Web developer, creating a fully functional and easily navigable site, including sales mechanisms and search-engine optimization – and under what time frame.

Also in advance, figure out what the service will cost – and how much flexibility there is to negotiate that figure. In contract work, payment schedules and compensation rates vary tremendously. A lot of market-rate knowledge is available by checking contractor-hiring sites such as Elance.com, and even looking on PayScale.com or Salary.com to get a picture of how much a contractor in a given position might expect to make in a year. It's also perfectly ok to ask applicants about their payment expectations.

When crafting a listing for the contract, include the tasks at hand as well as a paragraph detailing minimum qualifications, including preferred educational and experiential background. Supplement that with listings specific to the industry.

Writing the Agreement

Setting up a straightforward and clear agreement at the contract's start is crucial. These expectations should be codified in a written agreement that makes clear the services the contractor is supposed to undertake, and includes a timeline for when they should be completed by. It also lays out a payment system. Logistically, the contractor agreement should be labeled "Independent Contractor Agreement," and clearly state in its opening paragraph that it is not the intent of either party to enter an employee-employer relationship (note: sample Independent Contractor Agreements may be found by searching the internet or consulting legal counsel). It should set the duration for the contract, or termination date.

Next, the contract should detail the job that is to be done. Be detailed regarding the tasks at hand, not the manner in which they are to be performed. That said, deadlines should be included, as well as some language about the schedule and method of payment (including how the contractor should bill for the hours or flat rate) should come next.

Other items to include:

- State that the contractor is not an "agent of the company."
- Include a clause that as an independent worker the contractor may enter into other agreements not in conflict and a confidentiality agreement.

Legally, the contract is a key part of establishing a non-employee relationship, though it doesn't guarantee that the IRS or other agencies will agree that your contractor should not be reclassified as an employee. If the IRS deems an employee misclassified as a contractor, some states – particularly Colorado and Maryland – can enforce hefty tax penalties on the employer. When in doubt, consult the IRS's guidelines on the difference between an independent contractor and an employee.

It's very important to have the contract reviewed by legal counsel. Note: more information may be found at www.inc.com

Maximizing Productivity

There are ways to guide productivity and help ensure that a contractor will produce top-notch work while also hitting key deadlines. Enumerating the deliverables in the agreement is the first step. Second, be available along the way to answer any follow-up questions your contractor may have. Lastly, regular meetings should be scheduled at which your contractor can provide an update on their progress.

Independent contractors' work product and performance of duties should be reviewed by the Board or Executive Committee on a regular basis.

Public Relations

Public Relation's 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.

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 state and local organizations 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 states 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 local 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 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 locals and states.

Processes and Procedures

Highlighted below is information about ADHA procedures that directly affect state and local organizations.

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 state.
- 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 state and local 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 (state), Component (local), 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 March. 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 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.

Frequent Asked Questions about Billing

Q: What are ADHA's Billing Cycle's?

A: ADHA has two billing cycles for dues payment for your convenience: Summer Cycle and Winter Cycle.

- Summer Cycle enrollment runs from April 1st – September 30th
- Winter Cycle enrollment runs from October 1st – March 31st

Q. What are annual dues?

A: Annual dues are payment for the entire year in either billing cycle.

Q. How can I pay annual dues?

A: Annual dues may be paid by:

- New or rejoining members may complete the application and mail it in with a check or credit card information or contact ADHA
http://www.adha.org/downloads/ADHA_member_application.pdf
- Log into your member account to pay your annual dues at
<http://www.adha.org/news/real.htm>
- Make check payable to ADHA and mail it to: 444 N. Michigan Avenue, Suite 3400, Chicago, IL 60611
- Contact ADHA at 312/440-8900 to pay via credit card
- Enroll in the Quarterly Payment Plan
- Use the renewal slip in your dues mailing

Q. Am I eligible to enroll in ADHA's Quarterly Payment Plan (QPP)?

A. Any current Active, Retired/Senior, Member with Disabilities or International Member renewing their ADHA Membership may enroll in the QPP at anytime online or by contacting ADHA.

Also, any new, former or lapsed ADHA member may join the QPP at any time but must contact ADHA to do so. Please contact an ADHA Member Services representative @ 312/440-8900 and press 1.

Q. What are the scheduled payment collection dates for the QPP?

A. ADHA members on the Quarterly Plan will be charged on the following dates:

Winter Cycle

- Quarter 1 payment – January 1st
- Quarter 2 payment – April 1st
- Quarter 3 payment – July 1st

- Quarter 4 payment - October 1st

Summer Cycle

- Quarter 1 payment - July 1st
- Quarter 2 payment - October 1st
- Quarter 3 payment - January 1st
- Quarter 4 payment - April 1st

Q. I am a current ADHA member, how do I access the QPP?

A. If you are a current member and wish to change your billing to quarterly you will need to follow the instructions below:

- Log into your member only account by visiting: <http://www.adha.org/news/real.htm>
- Click the "Pay My ADHA Dues" link on the top right hand side of your profile
- 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
- Choose "add to basket" – Quarterly Payment Plan
- Follow the steps to complete your check and you are all set!

Q. Are there transaction fees for the QPP?

A. Yes. The Credit Card transaction fee is to be borne by the member and will be \$3.00 per quarterly payment.

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 QPP 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. If on the QPP, will I still receive a plastic membership card?

A. No. Members on the quarterly payment plan will not receive membership cards, but may print membership card through their members' only profile any time. The downloadable membership card is identical to the one that is mailed.

Q. If on the QPP, will I still receive dues notices in the mail?

A. No. Members will receive electronic notices of payment due 30 days prior.

Q. When are members on the QPP dropped for non-payment of dues?

A. Members on the QPP will be dropped for non-payment at 30 days after payment was due. See payment schedule for complete details.

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.

Q. What is the "Acknowledgement of Payment Program" when paying dues online?

A. In an online dues payment, the member will be asked to check a box that acknowledges they have read the terms of the payment program.

By providing us your credit card information, you hereby agree that ADHA may automatically renew your membership each year by charging the applicable membership dues fee directly to your credit card. You will be notified of the renewal 30 days prior and then your membership fee will be charged on an annual or quarterly basis according to the manner you have indicated. Please ensure we have updated credit card information so the renewal may be processed. If you do not want to have your dues automatically renewed each year, you may opt-out at any time.

Q. Why is the "Acknowledgement of Payment Program" required when paying dues online?

A. For those members who renew online their annual membership (whether paying the full amount or quarterly) they will be in "evergreen". So for winter cycle, members will get an email invoice on November 1st that lets them know that we currently have them in evergreen, and if they don't want to us to charge their card on January 1st - to email/call us back. Then we'll send another email invoice on December 1st with the same message. If the member chooses to opt-out, they will be included in subsequent dues mailings. For summer cycle, the email notices would go out May 1st and June 1st.

ADHA wants to give 60-days notice before we ever charge a member's credit card. The objective is to give every opportunity for an electronic or "green" transaction before we start the printing and postage process.

ADHA is committed to moving in a "green" direction, reducing costs that could be put to better use and borrowing from the best practices in the consumer world.

ADHA Monthly Reports

ADHA provides its state and local organizations with reports to help you keep track of your membership.

On a monthly basis, state treasurers receive the Proof of Payment (POP) Roster via email only. The report provides detailed information about the previous month'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 direct deposit to the states' bank account is issued for the dues collected.

On a monthly basis, state and local treasurers and 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.
- 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 15th
- Alpha Rosters:
 - List all **active** members
 - Are e-mailed every month
 - 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 (state) and Component (local) 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 state organization, and a local organization (if one exists in their geographic area) and whereby all membership categories in the Tripartite System are identical. Following are the Constituent (State) and Component (Local) Organization Administration Policies that include supplemental information.

Charters

Charters for the operation of States 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 State’s charter, the State 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 State in question, by registered mail and reasonable opportunity shall be allowed for the State to meet the requirements or correct infractions before final action is taken to revoke the charter.

Membership

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

ADHA + Constituent (State) + Component (Local) = Tripartite

Purpose

The purpose of ADHA's Constituent (State) and Component (Local) 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 State, and the Local, if any. ADHA shall remit to the State and the Local that portion of the dues applicable to their respective memberships.

State Annual Reports to ADHA

Each State 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 state annual reports must be submitted electronically, compiled by staff and available to state 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
2. Click on State and Local Resources
3. Scroll down to CLL/Annual Session.
4. Click on ADHA Constituent (State) Annual Report form (note: there is also a document with instructions located here)
5. Open the form and save it to your computer so that you can complete it over time.
6. Complete the form.

7. Email the form to exec.office@adha.net by Monday, June 1.

The compiled reports will be on the member's only side of the web site, under House of Delegates resources, after June 15.

Publicly Stated Positions

A Constituent (State) or Component (Local) 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, State or Component Local Organizations' authorized representatives may state official ADHA positions, as adopted and approved by ADHA's Board of Trustees. State or Local Organizations may not otherwise make statements on behalf of ADHA.

Contracts

Constituent (State) or Component (Local) Organizations may not bind ADHA to any contract, written or oral, express or implied. In entering any agreement, the State or Local organization 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 (State) and Component (Local) 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 State or Local Organizations 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 (States) not be in conflict with the bylaws of the parent organization. Therefore, these guidelines and model bylaws have been developed to ensure that state and local organizations are in compliance with the bylaws of the American Dental Hygienists' Association.

I. States 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 state 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 state 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 state 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 state 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 state. The remaining sections in this article should mirror the intent of those of ADHA, with the addition that the state should also be notified of a member's resignation. It is understood that states may establish the amount of dues.

IV.Regarding Article IX, Committees/Councils/Task Forces, States 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 State may not have a Finance Committee because their Executive Committee handles those responsibilities.

V.Regarding Article X, State and local organizations, this should mirror the language set forth in the guidelines. States charter and have responsibility for Locals, as national does for States.

VI.Article XVI, Amendments, this should be similar to that of ADHA, but notice of intent, etc., should be submitted to the state or local president or executive director and the time frame can be suited to the state 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 "State 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 "State Model Bylaws" and may easily be adapted to respective states.

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

Once your state 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.

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 state and local organizations 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, and state and local organizations. This division processes dues payments, 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; interacts with other health professions, consumer groups, and health workforce agencies; promotes the implementation of the National Dental Hygiene Research Agenda; and provides resource support through conferences and research.

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

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
 Award for Excellence
 Alfred C. Fones Award
 Irene Newman Award
 Student Member Community
 Service Award
 Graduate Transition Award
Spotlight
 Operating Guide
 State and Local Officer
 Information
 Guidelines for Bylaws
 Insurance Brochures (Health,
 Liability, Disability, Life, Auto)
 Membership Rosters
 Membership Applications and
 Benefits

Membership Cards
 Membership Certificates
polish
 Student Experience and
 Transition Programs
 Student Membership and
 Rosters
 Student Member Track at
 Annual Session
 Student Table Clinic and
 Research Poster Session
 Student Advisor Contact
 Information
 100% Faculty Membership
 Award

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
 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

ADHA Contact Information

For all membership and operational questions, please contact:

Jennifer Hill, Senior Manager of State and Local Relations

P: 312-440-7386

F: 312-440-6766

jenniferh@adha.net

ADHA Central Office

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

Email: mail@adha.net

Addendum

- Parliamentary Procedure
- ADHA Leadership Values Agreement
- Conflict of Interest Policy
- ADHA Rules of Conduct
- Sample Meeting Agenda
- Sample Meeting Minutes
- Sample Retention Letter
- Benefits of Membership
- Sample Recruitment Letter – Graduates
- Sample New Member Welcome Letter
- Sample Panel Discussion for Students
- Sample Student Communications Calendar

Parliamentary Procedure

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.

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 you¹ 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:

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:

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:

6. Leadership Role in Other Organizations

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

No _____ Yes _____ Please List:

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 am 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: _____

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. Submission of Disclosure Documents			
5. Additions to the Agenda		8:30a	
6. Approval of the Agenda		8:40a	
7. Approval of Consent Agenda <ul style="list-style-type: none"> • Previous Minutes/Report • Committee Reports • Committee Reports <p><i>Note: the Chair should be notified of any items to be removed from the consent agenda before the meeting</i></p>	Exhibit A Minutes Reports	9:00a	Approve Consent Agenda or Request Clarification or Removal of an Item from the Agenda for Discussion
8. Review of Association's Strategic Plan	Exhibit B	10:00a	Develop Strategic Plan
9. Committee Initiative/Program 1	Exhibit C	11:30a	Approve
LUNCH BREAK		12:30-2:00p	
10. Committee Initiative/Program 2	Exhibit D	2:00p	Brainstorm
11. Committee Initiative/Program 3	Exhibit E	3:00p	Approve
12. Unfinished Business		4:00p	
13. New Business		4:30p	
14. 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. Submission of Disclosure Documents

Each committee member submitted signed copies of the Leadership Values Agreement, the Conflict of Interest Policy and the ADHA Rules of Conduct.

5. Additional Agenda Items

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

6. Approval of Agenda

The agenda was reviewed and adopted.

7. 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:

8. Review of Association's Strategic Plan

The committee reviewed the association's strategic plan.

9. Committee Initiative/Program 1

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

10. Committee Initiative/Program 2

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

11. Committee Initiative/Program 3

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

12. Unfinished Business

There was no unfinished business.

13. New Business

There was no new business.

14. Adjournment

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

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 state and local 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 state and local local 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,

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.

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 and local dental hygienists' association. Your state and local organizations 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 - Graduates

<Date>

<Name>

<Address>

Dear <Salutation>:

Our records indicate that you will graduate soon. On behalf of the (American Dental Hygienists' Association, state, or local), 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 a Career 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, state, or local)! 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 state and local benefits).

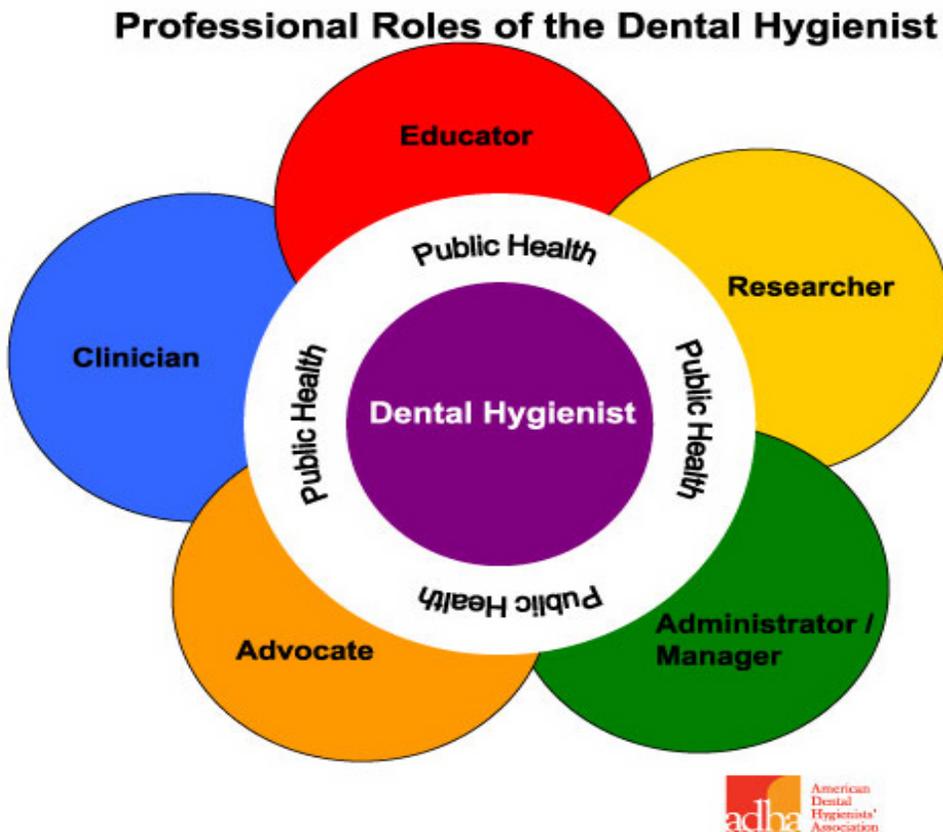
If you have any questions about membership in (state or local), please call (membership chair). If you have questions about ADHA, please call ADHA's Division of Member Services at 312/440-8900. They will be happy to help you. Thank you for showing your support to ADHA and its goals by becoming a member.

Sincerely,

President

Enclosure

Sample Panel Discussion for Students



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 state/local 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.

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 last 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 local 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 local 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!