



# District Leadership Training

**Wednesday, August 23, 2023**

**Via Zoom**

Agenda:

1. Opening Remarks
2. Governance
3. Membership
4. District Accounting & Finance
5. Continuing Education
6. Advocacy
7. Handy Checklist



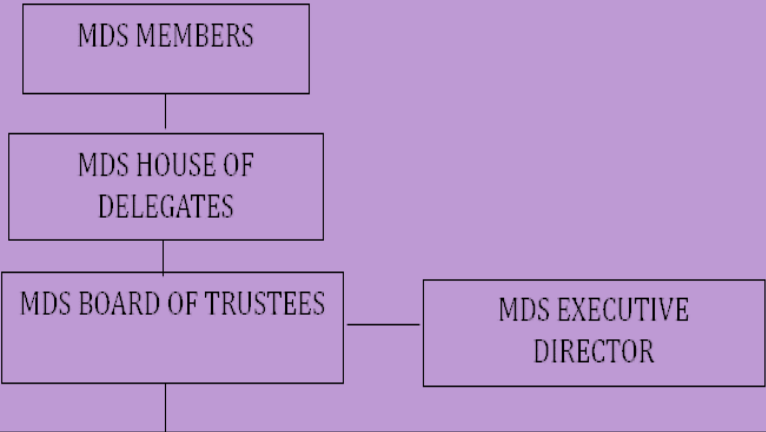
2023-2024 District Leadership Training

# Governance

Colleen Chase

# Governance

## MDS Governance Organizational Chart

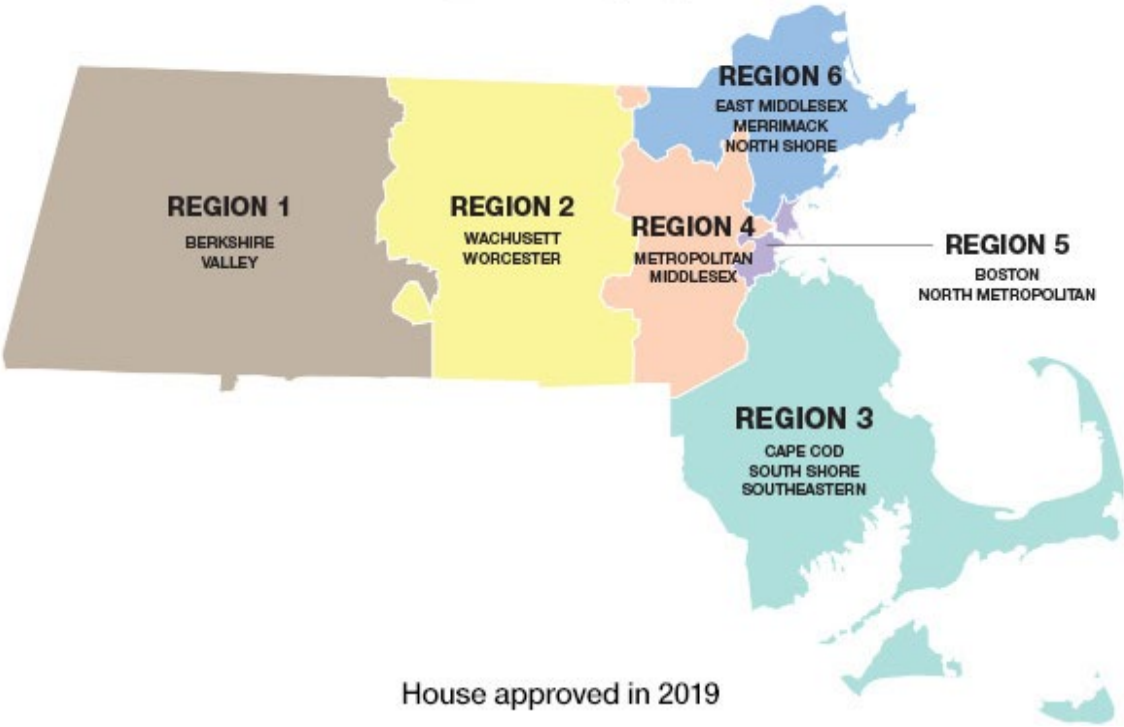


### ACTIVE COMMITTEES

As outlined in the MDS Board of Trustees Organizational and Operating Manual:

- |  |   |
|--|---|
| Audit Committee                                    | Government Affairs Committee              |
| Budget & Fiscal Planning Committee                 | Investment Subcommittee                   |
| Business Development Committee                     | Membership Committee                      |
| Constitution & Bylaws Committee                    | Peer Review Committee                     |
| Dental Education Committee                         | Trustee Selection & Nominations Committee |
| Dentist Health & Wellness Committee                | Waiver Review Committee                   |
| Dental Practice & Benefits Committee               | Yankee Oversight Committee                |
| Ethics Committee                                   | Additional Yankee Volunteer Committees    |
| Executive Director Review & Compensation Committee | Various Task Forces as appointed          |

## MDS REGIONS



House approved in 2019

# Governance

## MDS Board of Trustees Meetings District Chairs - Save a Date

- September 22
- November 17
- March 8
- May 17

District Chairs are invited to one meeting of the Board of Trustees per governance year.

All meetings begin at 8:00 am and are held at MDS Headquarters

Contact Colleen Chase for questions  
[cchase@massdental.org](mailto:cchase@massdental.org)



Abe Abdul, DMD, MBA  
President



Steven Spitz, DMD  
Vice President



David Samuels, DMD  
Speaker of the House



Maritza Morell, DMD, MPH  
Secretary



Jennifer R. Korzeb, DMD  
Treasurer



Meredith A. Bailey, DMD  
Immediate Past President



Kevin C. Monteiro, CAE  
CEO & Executive Director



Colleen Chambers, DMD  
Region 1 Trustee (Berkshire,  
Valley)



Charles Greffrath, DMD  
Region 2 Trustee (Wachusett,  
Worcester)



Jeffrey Karen, DDS  
Region 3 Trustee (Cape Cod,  
South Shore, Southeastern)



Mary C. DeMello, DMD  
Region 4 Trustee  
(Metropolitan, Middlesex)



Michael A. Mayr, DMD  
Region 5 Trustee (Boston,  
North Metropolitan)



Albert Sandler, DMD  
Region 6 Trustee (East  
Middlesex, Merrimack Valley,  
North Shore)



Dylan Weber, DDS  
At-Large Trustee

# Governance

## Save the Date

MDS House of Delegates

Thursday, June 20, 2024

## Open Positions for the Upcoming Governance Year

- Treasurer
- Speaker of the House
- Regional Trustee
  - Region 2: Wachusett & Worcester
  - Region 3: Cape Cod, South Shore & Southeastern
  - Region 5: Boston & North Metropolitan
- At-Large Trustee



Contact Colleen Chase for questions [cchase@massdental.org](mailto:cchase@massdental.org)

Do you have  
any  
Questions?



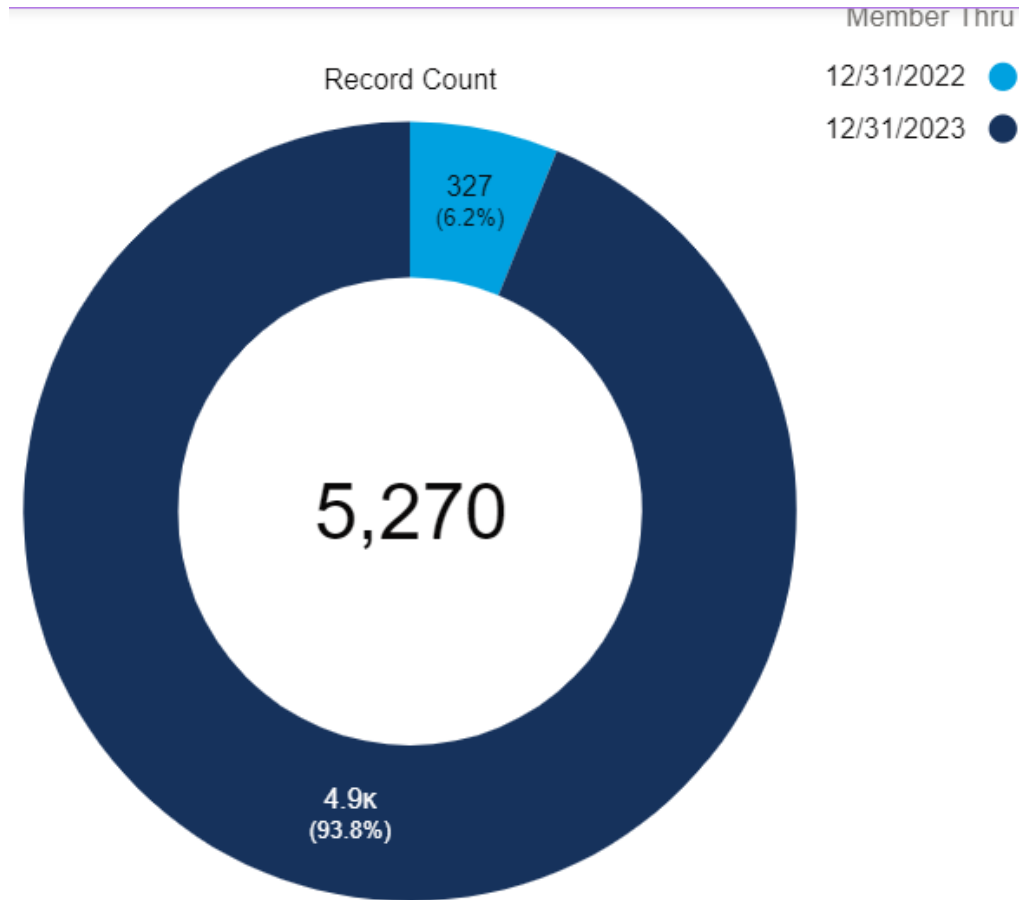


2023-2024 District Leadership Training

# Membership & District Support

Ellen Factor

## Membership



**94% 2023**  
**members renewed**  
**their memberships**

## Tripartite Membership

Nonrenewals- members who did not renew this year

1.25 1.00 0.75 0.50 0.25 0.00



# Membership

## One Year Plan

Research industry best practice for member engagement scoring

Create plan to improve member value

Develop and start implementing a member engagement score/rating system

73% Market Share

Survey members and non-members

Targeted recruitment

Improve data integrity

Targeted retention – focus 3yrs or less



## Three Year Plan

Actively measuring members engagement, participation, and value.

Provide Members with a report card value summary.

Create and execute plan to improve member value and retention of members 3 yrs or less in practice.

78% Market Share

Increase DSO Participation

# What is Membership Working on

- Dues Processing and Salesforce Data Integrity
- Advocacy- MDS Bills and MLR
- Member engagement
  - 'A' & 'C' Engagement Plan
  - Signing Day Data Management
  - Dental Assisting Campaign Phase II
  - Member Survey Launch
  - Developing customer Feedback plan
  - Developing Member engagement Score System
- District Programs and communication
  - Leadership Training (8.23.2023 7 pm)
  - Weekly eNews and stand-alone emails
  - Summer Journal and Fall Journal
  - Social Media Strategy & Calendar
  - Dental Insights
  - Meet the New Board Members
  - Student Programming
- Contracted Services Management
- District Services

# 2023 ADA Membership Awards



- Converted the highest percentage of non-members to members



- Greatest net gain in new dentists



- Converted highest number of diverse dentists to membership



# District Support

- Quarterly District membership dashboards
- Email and Newsletter templates
- Maintain membership database
- Process new District members
- Quarterly new Member reports
- Annual District Leader Training
- Peer review District support
- Maintain District calendar & web pages
- Facebook admin support

# District Support

- Annual Peer Review training
- Specific District reports per request
- Mailing list report
- Mailing Life Member pins to District leaders to distribute
- Weekly District email blasts
- Mailing label file
- Process District expenses
- Process District dues annually
- Quarterly District finance report
- Tax prep included in MDS tax filing

# District Support

## Management Service Contract

- Some Districts may need additional support. For those Districts, the MDS **may be able** to offer management services for a contracted fee as resources allow
- If your District is interested in initiating a **20-hour per month minimum** contract with the MDS, contact Ellen Factor at [efactor@massdental.org](mailto:efactor@massdental.org) or 508.449.6023 for review.

# District Support

- Email to District Members
  - Section 6 of District Manual
  - Thursday – dedicated District email day
  - **Must submit the email request at least 7 days in advance**
    - Newsletter membership@massdental.org
    - Email blast request membership@massdental.org
  - Approve email draft to [districts@massdental.org](mailto:districts@massdental.org)
  - Assign one person in District to approve

# District Support

- MDS Calendar
  - Displays all MDS and District events
  - Visit MDS homepage or directly at [massdental.org/Member-Resources/Events](https://massdental.org/Member-Resources/Events)

March 2022						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
27	28	1 Valley District Exec...	2	3	4	5
6	7	8 East Middlesex Dis...	9 Metropolitan Distri...	10 Boston District Den... Cape Cod District D... Merrimack Valley D...	11	12
13	14	15 Worcester District ...	16	17	18	19
20	21	22	23 Middlesex District ...	24 South Shore Execut...	25	26
27	28	29	30 Worcester District ...	31 North Shore Distric...	1	2



# District Support


- Web
  - Dedicated District web content
    - Meetings and Events
    - District Leadership
    - Documents and Resources
      - *Bylaws*

MDS Members > About the MDS > District Dental Societies > Middlesex District Dental Society

## Middlesex District Dental Society

Members of the Middlesex District Dental Society have a primary address in the cities of Acton, Arlington, Bedford, Belmont, Burlington, Cambridge, Concord, Lexington, Lincoln, Somerville, Waltham, Watertown, Waverly, Wilmington, and Winchester.

- Meetings and Events
- District Leadership
- Documents and Resources
- MDS Governance Structure



**MARY C. DEMELLO, DMD**

Mary C. DeMello  
Region 4 Trustee (Metropolitan, Middlesex)

Email >

### UPCOMING DISTRICT EVENTS: MIDDLESEX

No upcoming events.

See More Events >

### MDS BOARD OF TRUSTEES SUMMARY

Read the most recent Massachusetts Dental Society Board of Trustees meeting summary.

Download >

## MDS Contacts for District Email Support

Districts	Staff Liaison	Phone	Email
Middlesex South Shore Valley (WITH CONTRACTS)	Sarah Pilling	508.449.6012	sharlinski@massdental.org districts@massdental.org
Berkshire Boston Cape Cod East Middlesex Merrimack Valley Metropolitan North Metropolitan North Shore Southeastern Wachusett Worcester	Sarah Pilling	508.449.6012	spilling@massdental.org districts@massdental.org

# Member Communications

# Membership

Schedule	Type/ Frequency
Monday	Dental Insight 2x per month
Tuesday	eNews Weekly
Wednesday	Yankee Communications/ Webinars
Thursday	District Communication
Friday	Special Announcements, Presidential messages
Saturday/Sunday	Open rarely utilized

Do you have  
any  
Questions?





2023-2024 District Leadership Training

# Finance

Susan Griffin & Sean Nadeau

# District Financial Meetings

- District Treasurer Meetings
  - Collaborate
  - Guidance on procedures
  - Communicate and Share Ideas
  - Includes the District Treasures and District Chairs
- Upcoming Meetings
  - Wednesday, November 15th at 7:00pm
  - Wednesday, February 7th at 7:00pm
  - Monday, May 6th at 7:00pm



# MDS Accounting Department

Susan Griffin, Managing Director of Accounting and Finance

[sgriffin@massdental.org](mailto:sgriffin@massdental.org)

Sean Nadeau, Staff Accountant, District Coordinator

[districtaccounting@massdental.org](mailto:districtaccounting@massdental.org)

Karen Gum, Accounts Payable Specialist

[districtaccounting@massdental.org](mailto:districtaccounting@massdental.org)

# Financial Processes

- Financial Policies
  - Section 4 of the District Operating and Policy Manual.
- Financial Forms
  - Section 15 of the District Operating and Policy Manual.
- Financial Reporting
  - Provide guidance to the districts for the management of activities throughout the year and for planning in preparation for the upcoming fiscal year.
  - Comparative Balance Sheet
  - Comparative Income Statement
  - Budget vs Actual (If a budget is provided)
  - Dues Remits



# District Dues

- MDS processes and deposits all District dues payments
- Districts should review their dues rates on an annual basis
- October 1st is the deadline to make any changes to dues rates
- Set at a meaningful level to support the Districts
- Use the operating budget as a tool

# Accounts Receivable Procedures

## RECEIVABLES

All forms should be emailed to Sean Nadeau at [districtaccounting@massdental.org](mailto:districtaccounting@massdental.org)

Credit Card payments should be made over the phone to Accounts Receivable at 508-449-6032

Checks should be made payable to the District and mailed to the Massachusetts Dental Society at 2 Willow St. Suite 200 Southborough, MA 01745

### Sponsorship Checklist

#### MDS needs:

Sponsorship payment: check should be made payable to the District and mailed to the MDS

☐ OR

For credit card payment, please call Accounts Receivable at 508-449-6032

☐ Sponsorship contract: should be signed by both the sponsor and District leader

#### Sponsor *might* need:

☐ District W-9: Can be sent to Sponsor if required; please contact [districtaccounting@massdental.org](mailto:districtaccounting@massdental.org) for assistance

# Accounts Payable Procedures

## DISBURSEMENTS

All forms should be emailed to Sean Nadeau at [districtaccounting@massdental.org](mailto:districtaccounting@massdental.org)

Payments will be made within 2 weeks of receiving all documentation.

Involved parties will be informed when payments have been disbursed.

### Service Invoice Disbursements

- ☐ Contracts/agreements – completed and signed by both parties (Chair or Treasurer may sign)
- ☐ Check Request
- ☐ W-9
- ☐ Treasurer approval

### Product Invoice Disbursements

- ☐ Billed in the District's name
- ☐ Check request
- ☐ Treasurer approval

# Accounts Payable Events/Reimbursements

## Speaker/Performer Invoice Disbursements

- ☐ Contracts/agreements – completed and signed by both parties (Chair or Treasurer may sign)
- ☐ Check Request
- ☐ W-9
- ☐ Treasurer approval
  - Note: Disbursements over \$5000 are subject to 5% withholding per IRS regulation
  - Speaker/Performer will be provided 1099-MISC at end of year showing withholding deducted

## Venue Invoice Disbursements

- ☐ Contracts/agreements – completed and signed by both parties (Chair or Treasurer may sign)
- ☐ Check Request
- ☐ W-9
- ☐ Treasurer approval

## Reimbursement Disbursements

- ☐ Receipts
- ☐ Check request
- ☐ Treasurer approval

Do you have  
any  
Questions?





2023-2024 District Leadership Training

# Continuing Education

Dorrey Powers & Alicia Blake

# Continuing Education



## ○ CE Requirements to Maintain Licensure

Category	# of CEUs	Cycle	Requirement
Dentist	40	4/1/22 - 3/31/2024 (even years)	*CDC Guidelines, **CPR/AED or BLS and ***Pain Management
Dental Hygienist	20	4/1/2023- 3/31/2025 (odd years)	*CDC Guidelines and ** CPR/AED or BLS
Dental Assistant	12	11/1/2021 - 10/31/2023 (odd years)	*CDC Guidelines and **CPR/AED or BLS

# Continuing Education

- **Criteria for CE Acceptance:**

- **1 CEU = 50 Minutes (Continuing Education Units)**



- **Must have significant content dealing with:**

- **Practice of Dentistry**
    - **Dental Auxiliary Functions**
    - **Professional Responsibilities or Ethical Obligations of the Profession**

- **No personal finance or retirement planning**



# Continuing Education

- **Criteria for CE Acceptance cont.:**
  - **Live vs. On Demand**
  - **Certificate of Attendance**
  - **Record Keeping Requirements and Options**
  - **District Schedule and Quiet Period**
  - **ADA CERP Recognized Providers**



The Yankee Study Club is **GROWING!**

Help share the exciting news of:

- The industry leading speaker lineup that are sharing thought-provoking topics.
- The convenience of virtual classes and opportunity to maximize your experience by also attending the in-person program at the Yankee Dental Conference.



**YANKEE**  
STUDY CLUB

**Wednesdays, 6:30 - 8:30 pm**

**September 6, September 27,  
October 25, November 15**

**REGISTRATION NOW OPEN**  
**[yankeedental.com/study-club](https://yankeedental.com/study-club)**

**It doesn't matter if you're a hygienist, dental assistant, office manager, or dentist—everyone is welcome!**

**Connect, Grow and Thrive in Today's New Dental Landscape with the Following Sessions:**

- **September 6th:**
  - [Oral Malignancies and Mimics](#)
- **September 27th:**
  - ["One Pill Good, Two Pills Better?: How and Why Dental Patients Self-Medicate in a Post-Pandemic World"](#)
- **October 25th:**
  - [Lens of Empathy: Using Clinical Photography to Connect and Communicate with Patients](#)
- **November 15th:**
  - [How are Sleep Disorders and TMD Related and How to Treat](#)

## **Fall 2023 Pricing:**

**\*Register for each individual session.**

**ADA MEMBER: \$75/session**

**RECENT GRADUATES (3 YEARS AND UNDER): \$55/session**

**NON-MEMBER: \$99/session**

**AUXILIARY STAFF: \$45/session**

**STUDENT (DENTAL STUDENTS & RESIDENTS): FREE**

**Attendees will earn 2 CE per session.**

# Continuing Education

## ○ Upcoming CE Events:

- BORID Package Day: CPR/Infection Control/Pain Management
  - Friday, September 8th, 2023 – **SOLD OUT!**
- MDS Learning Courses Fall 2023
  - Practice Growth: Guide to Buying, Building, Expanding, Relocating & Renovating with Peter Gantos and Lee Tessler
    - In-Person at the MDS Headquarters: Tuesday, September 12th, 2023 6:30 – 7:30 pm
  - LGBTQIA2S+ & DEI Oral Health Workshop with Tyler Sanslow, DMD
    - In-Person at the MDS Headquarters: Tuesday, September 19, 2023 6:00 – 8:00 pm
  - Think Like a CEO with Chris Salerino, DDS
    - Live Zoom Webinar: Thursday, November 9, 2023 6:00 – 8:00 pm



  
**YANKEE<sup>®</sup>**  
DENTAL CONGRESS

**JANUARY 25 - 27, 2024**  
BOSTON CONVENTION & EXHIBITION CENTER

## **EASY WAYS YOU CAN HELP PROMOTE YANKEE 2024:**

- 1. Send a message to your district or friends**
- 2. Share posts with your friends that are posted on the Yankee Dental Congress Facebook, LinkedIn, Instagram and Twitter page**
- 3. Once you register for Yankee 2024, let your friends on social media know**

**CONNECT &  
COLLABORATE**

**yankeedental.com | 877.515.9071**

Do you have  
any  
Questions?





2023-2024 District Leadership Training

# Advocacy

Dan DiTullio

Director of Government Affairs

# Legislative Process & Political Climate in Massachusetts

## From Bill to Law:

1. Filing and Numbering
2. Committee Assignment (hearing and reporting)
3. Debate and Passage by House and Senate
4. Conference Committee
5. Enactment and Passage into Law





# 2023-2024 Legislative Priorities

## Bills Sponsored by the MDS

### **House Bill 1122 - An Act relative to financial services contracts for dental benefits corporations**

Sponsor: Rep. Angelo J. Puppolo, Jr.

Committee: Joint Committee on Financial Services (as of August 1, 2023)

### **House Bill 1123 - An Act further clarifying the delivery of health care.**

Sponsor: Rep. Angelo J. Puppolo, Jr.

Committee: Joint Committee on Financial Services (as of August 1, 2023)

### **House Bill 1124 - An Act relative to dental insurance assignment of benefits**

Sponsor: Rep. Angelo J. Puppolo, Jr. (D)

Committee: Joint Committee on Financial Services (as of August 1, 2023)





# 2023-2024 Legislative Priorities

## Bills Supported by the MDS

**House Bill 3880: An Act relative to dental hygienist reciprocal licensure**

Sponsor: Rep. Tackey Chan

Committee: Joint Committee on Financial Services (as of August 1, 2023)

**House Bill 300: An Act establishing a dentist diversion program.**

Sponsor: Rep. Denise C. Garlick

Committee: Joint Committee on Health Care Financing (as of August 1, 2023)

## Bill OPPOSED by the MDS

**Senate Bill 460: An Act instituting a ban on fluoride supplementation of public water supplies**

Sponsor: Sen. John Cronin (By citizen request)

Committee: Joint Committee on Environment & Natural Resources (as of August 1, 2023)



# Advocacy at the District Level

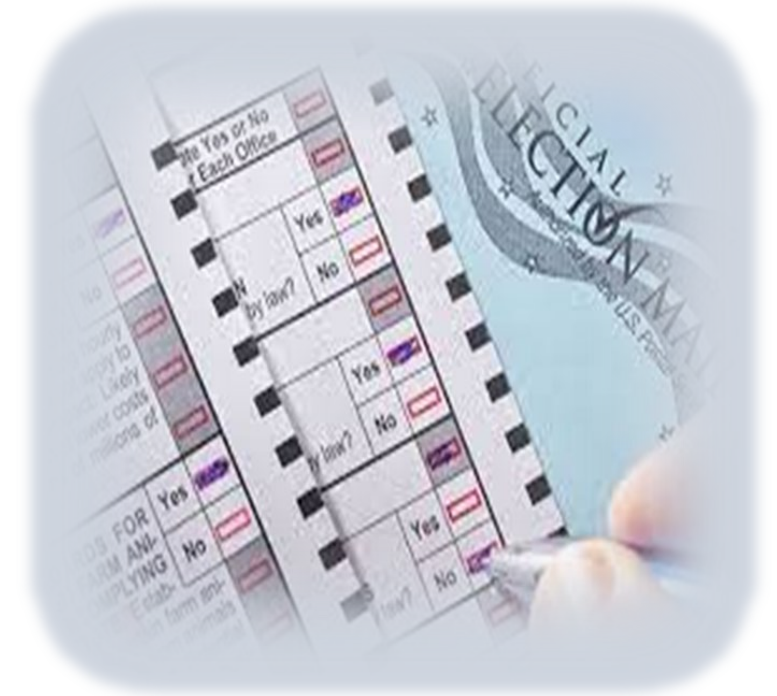
- District meeting/workshop with Government Affairs Director
- District meetings with elected officials
- Grass-roots local advocacy campaigns
- Day on the Hill
- The MDS Political Action Committee



# Update: MLR Fall Ballot Initiative

- Hearings have concluded
- The Division of Insurance (DOI) must now promulgate the draft regulations for review.
- Highly internalized process
- Involves not only DOI but
  - ✓ Office of Consumer Affairs
  - ✓ Executive Office of Economic Development
  - ✓ Executive Office of Administration and Finance
  - ✓ Mass Attorney General
  - ✓ Mass Secretary of State

The MDS will continue to monitor the regulatory process to ensure that the law is closely aligned with the intent of the ballot initiative that Massachusetts residents overwhelmingly supported in the November 2023 Massachusetts election.



Do you have  
any  
Questions?



# Checklist

Handy checklist to get your year started right!

Find it in the Introduction Section of the District Manual

## ACTION ITEMS CHECKLIST ✓

Jumpstart Your Role by Completing These Action Items

- ☐ Review this manual at [massdental.org/district-manual](https://massdental.org/district-manual)
- ☐ Review the Plan Your Year page (Introduction)
- ☐ Decide who will maintain a copy of District CE records, or decide if your District will be using the MDS record-keeping system to store your records in the cloud (Section 5)
- ☐ Decide your District program structures and venues (both CE and social). If you plan to conduct a virtual CE program in your District, email [membership@massdental.org](mailto:membership@massdental.org) with your interest in purchasing a Zoom license.
- ☐ Check the MDS calendar and any religious holidays before scheduling program dates
- ☐ Assign a District Communicator. Send all District communication to [districts@massdental.org](mailto:districts@massdental.org) (Section 6)
- ☐ Send your District CE calendar to the MDS to post on your District page (Section 6)
- ☐ Login to your District page to be sure all is correct and that your programs are all accounted for. Go to [massdental.org](https://massdental.org) and use the search feature to find the name of your District and locate your District page.
- ☐ Review your District *Bylaws* on your District webpage
- ☐ Ensure all your District finance procedures are in place (Section 4)
- ☐ Reach out to new members monthly (Request from [aromero@massdental.org](mailto:aromero@massdental.org))
- ☐ Assign a moderator for your District Facebook page and review new Facebook Administration rules (Section 6)



Watch for these Blue Boxes throughout the manual for Action Items!

# Questions?

**Ellen Factor** | Managing Director, Membership and Dental Practice | [efactor@massdental.org](mailto:efactor@massdental.org)

**Janine Avery** | Manager, Member Engagement | [javery@massdental.org](mailto:javery@massdental.org)

**Susan Griffin** | Managing Director, Accounting and Finance | [sgriffin@massdental.org](mailto:sgriffin@massdental.org)

**Dorrey Powers** | Director, Continuing Education and Programming | [dpowers@massdental.org](mailto:dpowers@massdental.org)

**Dan DiTullio** | Director, Government Affairs and Public Relations | [dditullio@massdental.org](mailto:dditullio@massdental.org)

**Sarah Pilling** | Coordinator District Services & Peer Review | [spilling@massdental.org](mailto:spilling@massdental.org) & [districts@massdental.org](mailto:districts@massdental.org)

**Sean Nadeau** | Coordinator District Accounting | [districtaccounting@massdental.org](mailto:districtaccounting@massdental.org)

thank you!

**FOR YOUR LEADERSHIP!**