

## 2025 UPDATED INDEX

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++\*\*\*Newly Received (Received and Processed September 3–October 6; Posted October 15)

#Newly Received (Received and Processed September 15–October 16; Posted October 21)

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Resolution No. 507 New

Report: N/A Date Submitted: 5/23/2025

Submitted By: Dr. Steven Saxe, delegate, Nevada

Reference Committee: D (Legislative, Governance and Related Matters)

Total Net Financial Implication: \$350,000 Net Dues Impact: \$4.00

Amount One-time: One-Time Amount On-going: \_\_\_\_\_

ADA Strategic Forecast Outcome: Public Profession: Increase and improve dental coverage and access.

1 **SUPPORTING PLAINTIFFS’ IN RE: ZELIS REPRICING ANTITRUST LITIGATION LAWSUIT TO**  
 2 **PROMOTE FAIR REIMBURSEMENT AND TRANSPARENCY IN DENTAL INSURANCE**

3 The following resolution was submitted on Friday, May 23, 2025, by Dr. Steven Saxe, delegate, Nevada.

4 **Background:** On June 11, 2025, *In Re: Zelis Repricing Antitrust Litigation* was refiled in the U.S. District  
 5 Court for the District of Massachusetts (Case No. 1:25-cv-10734-BEM; consolidated with Case Nos.: 1:25  
 6 –CV-11092-BEM and 1:25-CV-11167-BEM)); as an Amended and Consolidated Class Action Complaint,  
 7 on behalf of Plaintiffs’ Pacific Inpatient Medical Group, Inc., Frank Scaccia, M.D., F.A.C.S., L.L.C., Dennis  
 8 C. Ayer, DDS, LLC and Danny Bachoua Chiropractic, APC (collectively “Plaintiffs”) alleging a horizontal  
 9 conspiracy among Zelis Healthcare, LLC, Zelis Claims Integrity, LLC and Zelis Network Solutions, LLC  
 10 (collectively “Zelis”) and major insurers (UnitedHealth Group, Elevance Health, Aetna, Humana, Inc. and  
 11 The Cigna Group) to suppress out-of-network dental reimbursement rates through shared pricing  
 12 algorithms (<https://paulllp.com/antitrust/zelis-lawsuit/>).

13 This lawsuit is one of the first to apply the Competitive Health Insurance Reform Act of 2020 (Pub. L. No.  
 14 116-327), which restored federal antitrust enforcement to health and dental insurers by repealing their  
 15 exemption under the McCarran-Ferguson Act (Public Comment on Lack of Competition in the U.S. Dental  
 16 Insurance Market, American Dental Association, May 21, 2025, pp. 2–4).

17 Plaintiffs’ case directly addresses issues that impact ADA members nationally, including coercive  
 18 repricing of out-of-network claims, contractual manipulation, and suppression of fees—trends long  
 19 identified and documented by the ADA Health Policy Institute (HPI), led by the ADA’s Chief Economist  
 20 and Vice President, which provides extensive economic and insurer data on dental practice trends (Public  
 21 Comment on Lack of Competition in the U.S. Dental Insurance Market, ADA, pp. 4–10).

22 The ADA possesses extensive internal data and analytics resources, including state-by-state fee trend  
 23 analysis, evidence of code bundling and denial strategies, and prior investigative findings on dental  
 24 insurer behavior that would be highly material to supporting Plaintiffs’ claims and educating regulators  
 25 and courts on broader industry patterns (Public Comment on Lack of Competition in the U.S. Dental  
 26 Insurance Market, ADA, pp. 5–7, 9–12).

27 The ADA has already called for antitrust enforcement in the dental insurance market through its May  
 28 2025 public comment to the U.S. Department of Justice and can further that commitment by supporting  
 29 this litigation directly with data, financial resources, and expert testimony (Public Comment on Lack of  
 30 Competition in the U.S. Dental Insurance Market, ADA, pp. 10–13).

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**Resolution**2  
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**507. Resolved**, that the Board of Trustees be urged to formally support the plaintiffs in the federal antitrust case of in *Re: Zelis Repricing Antitrust Litigation* (Case No.: 1:25 -cv-10734-BEM; consolidated with Case Nos: 1:25 -CV-11092-BEM and 1:25-CV-11167-BEM), as a landmark enforcement of the Competitive Health Insurance Reform Act of 2020 (Pub. L. No. 116-327) among other claims, and be it further

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**Resolved**, that the ADA allocate financial support and expert resources, subject to legal review and appropriate oversight, through the ADA Health Policy Institute (HPI)—including claims data, reimbursement trend reports, and coding analytics—to assist in the litigation and any resulting legal or policy actions, and be it further

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**Resolved**, that the ADA collaborate with Plaintiffs' legal counsel to share relevant data, develop expert reports, and, where appropriate, submit or support legal filings such as amicus briefs, and be it further

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**Resolved**, that the ADA utilize legal, public affairs, and Health Policy Institute resources to urge the U.S. Department of Justice and Federal Trade Commission to investigate alleged collusion and market manipulation in the dental insurance industry, consistent with the authority granted under the Competitive Health Insurance Reform Act of 2020 (Pub. L. No. 116-327).

**BOARD COMMENT:** The Board of Trustees appreciates and supports this resolution. Insurance issues are often top of mind for ADA members and the Board believes that supporting member efforts is prudent. However, considering that resources and expenses that would be needed to fully support the resolution as written, the Board offers a substitute that balances the need to support the complaint with the need to be fiscally responsible.

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**507B. Resolved**, that the Board of Trustees be urged to formally support the plaintiffs in the federal antitrust case of in *Re: Zelis Repricing Antitrust Litigation* (Case No.: 1:25 -cv-10734-BEM; consolidated with Case Nos: 1:25 -CV-11092-BEM and 1:25-CV-11167-BEM), as a landmark enforcement of the Competitive Health Insurance Reform Act of 2020 (Pub. L. No. 116-327) among other claims, and be it further

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~~**Resolved**, that the ADA allocate financial support and expert resources, subject to legal review and appropriate oversight, through the ADA Health Policy Institute (HPI)—including claims data, reimbursement trend reports, and coding analytics—to assist in the litigation and any resulting legal or policy actions, and be it further~~

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~~**Resolved**, that the ADA assist collaborate with Plaintiffs' legal counsel, if needed to share existing relevant ADA data, develop expert reports, and, where appropriate, submit or support legal filings such as an amicus briefs, and be it further~~

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~~**Resolved**, that the ADA utilize legal, public affairs, and Health Policy Institute resources to urge the U.S. Department of Justice and Federal Trade Commission to investigate alleged collusion and market manipulation in the dental insurance industry, consistent with the authority granted under the Competitive Health Insurance Reform Act of 2020 (Pub. L. No. 116-327).~~

1 **BOARD RECOMMENDATION: Vote Yes on the Substitute.**

2 **Vote: Resolution 507B**

BERG	Yes	DOWD	Yes	KNAPP	Yes	STUEFEN	Yes
BOYLE	Yes	GRAHAM	Yes	MANN	Yes	TULAK-GORECKI	Yes
BROWN	Yes	HISEL	Yes	MARKARIAN	Yes	WANAMAKER	Yes
CAMMARATA	Yes	HOWARD	Yes	MERCER	Yes		
CHOPRA	Yes	IRANI	Yes	REAVIS	Yes		
DEL VALLE-SEPÚLVEDA	Yes	KAHL	Absent	ROSATO	Yes		



1 In the United States, there have been notable efforts to combat the human trafficking issue. For example,  
2 the Uniform Law Commission has developed Uniform Act on Prevention of and Remedies for Human  
3 Trafficking (“the UAPRHT”), model legislation designed to ensure effective action, coordination and  
4 collaboration between the states, the District of Columbia, Puerto Rico, and the U.S. Virgin Islands to  
5 curtail human trafficking and what is, in effect, modern-day slavery.

6 During its periodic review of the Council’s statement on the reporting of suspected abuse and neglect, the  
7 Council became aware that some states have enacted requirements for healthcare providers to report  
8 instances where human trafficking is suspected. Much like suspected instances of abuse and neglect,  
9 jurisdictional requirements for reporting the suspected trafficking of individuals are not uniform. But  
10 awareness of the human trafficking issue is being fostered within the dental profession by discussions of  
11 the issue within dental schools, enactment of the UAPRHT by states, and continuing education courses  
12 about the human trafficking issue and recognizing signs of potential human trafficking presented by  
13 patients.

14 As the subject of human trafficking was being examined and discussed by the Council, it became  
15 apparent that the many important aspects of the issue were analogous and, in some cases, identical to  
16 the issues of abuse and neglect. Some of the similarities are:

- 17 • The need for practitioners to be aware of the position that the jurisdictions in which they practice  
18 have taken on the human trafficking issue, and whether their jurisdictions have enacted  
19 evolutionary policies, statutes or regulations on the issue;
- 20 • Whether the practitioners’ jurisdictions have adopted legislation that obligates practitioners to  
21 report suspected instances of human trafficking of which they become aware; and
- 22 • The positions of the practitioners’ jurisdictions on the question of whether immunity against  
23 liability is provided to health professionals who report suspected cases of human trafficking.

24 Because of the similarities between the issue of reporting suspected instances of abuse and neglect and  
25 suspected cases of human trafficking, the Council believes the most effective and efficient way to  
26 introduce the issue of suspected human trafficking into the ADA *Code of Ethics* is through amendment of  
27 the Code of Professional Conduct Section 3.E.

28 The Council believes that the time has come to include in the ADA *Code of Ethics* the obligation to  
29 become familiar with the signs of human trafficking and, where appropriate and consistent with state law,  
30 to report suspected issues of human trafficking to the proper authorities. A resolution to amend Section  
31 3.E. of the ADA *Code of Ethics* to accomplish that result appears below.

## 32 **Resolution**

33 **512. Resolved**, that the following revisions to Section 3.E. of the ADA *Principles of Ethics and Code*  
34 *of Professional Conduct* (additions underscored and deletions ~~stricken through~~) be adopted:

### 35 **SECTION 3.E. ABUSE AND NEGLECT.**

36 Dentists shall be obliged to become familiar with the signs of abuse, ~~and~~ neglect and human  
37 trafficking and to report suspected cases to the proper authorities, consistent with state laws.

38 **BOARD RECOMMENDATION: Vote Yes.**

39 **BOARD VOTE: UNANIMOUS (BOARD OF TRUSTEES CONSENT CALENDAR ITEM)**



- 1 **BOARD RECOMMENDATION: Vote Yes.**
- 2 **BOARD VOTE: UNANIMOUS (BOARD OF TRUSTEES CONSENT CALENDAR ITEM)**

Resolution No. 514 New

Report: CEBJA Report 3 Date Submitted: August 2025

Submitted By: Council on Ethics, Bylaws and Judicial Affairs

Reference Committee: D (Legislative, Governance and Related Matters)

Total Net Financial Implication: None Net Dues Impact: \_\_\_\_\_

Amount One-time: \_\_\_\_\_ Amount On-going: \_\_\_\_\_

ADA Strategic Forecast Outcome: Tripartite: Achieve a stable and successful Tripartite.

1 **AMENDMENT TO CHAPTER VIII., SECTION G. OF THE GOVERNANCE MANUAL**

2 **Background:** The Governance Committee of the ADA Board of Trustees has requested that the Council  
3 on Ethics, Bylaws and Judicial Affairs (“the Council” or “CEBJA”) examine Chapter VIII., Section G. of the  
4 *Governance Manual of the American Dental Association (“Governance Manual”)* to permit councils to  
5 meet in locations other than Chicago and Washington. This request was made in light of the Association’s  
6 affiliation with the Forsyth Institute located in the Boston, Massachusetts area. At present, Chapter VIII.,  
7 Section G. of the *Governance Manual* limits the locations where ADA councils can hold in-person  
8 meetings to the ADA Headquarters Building in Chicago, Illinois and the Washington Office, in  
9 Washington, D.C.

10 **Discussion:** As currently written, Chapter VIII., Section G. of the *Governance Manual* restricts councils  
11 from meeting in person except for meetings convened at the ADA Headquarters Building in Chicago,  
12 Illinois and the Washington Office in Washington, D.C. That provision states:

13 G. Meetings of Councils. Each council shall hold at least one regular meeting annually, provided that  
14 funds are available in the budget for that purpose and unless otherwise directed by the Board of  
15 Trustees. Meetings may be held in the Headquarters Building, the Washington Office or from  
16 multiple remote locations through the use of a conference telephone or other communications  
17 equipment by means of which all members can communicate with each other. Such meetings  
18 shall be conducted in accordance with rules and procedures established by the Board of  
19 Trustees.

20 In late 2023, the ADA’s footprint expanded beyond its established places of business at the ADA  
21 Headquarters Building at 211 East Chicago Avenue, Chicago, Illinois and its Washington Office at 1111  
22 14th Street, N.W., Washington, D.C. by affiliating with the Forsyth Institute in Cambridge, Massachusetts,  
23 one of the world’s foremost dental, oral and craniofacial research centers. That affiliation combined the  
24 ADA Science and Research Institute, ADASRI, with Forsyth, to become the ADA Forsyth Institute (“AFI”).  
25 In early 2025, AFI relocated within the Boston metropolitan area to a state-of-the-art office and clinical  
26 research facility located at 100 Chestnut Street, Somerville, Massachusetts.

27 In order to jumpstart collaborative efforts between AFI and the ADA, ADA senior leadership believes it  
28 would be fruitful to have volunteers, including those serving on councils, visit the AFI facilities in  
29 Massachusetts. Not only will visitors be able to see the facilities that are available for collaborative efforts,  
30 but they will also have the ability to meet and begin to forge personal connections with AFI personnel. It is  
31 anticipated that the exposure of ADA volunteer leaders to AFI capabilities and researchers and AFI’s  
32 exposure to the ADA cadre of dedicated and talented volunteers may serve as a catalyst for innovative  
33 advances and collaborations between the two organizations.

1 During discussions on the request to amend Chapter VIII., Section G. of the *Governance Manual* to allow  
2 councils to meet in person in venues other than Chicago and Washington, and specifically allowing  
3 counsels to meet in the Boston area, it was remarked that travel expenses for meetings in Boston would  
4 likely exceed the expenses incurred for Chicago meetings. In Chicago, the ADA has the benefit of  
5 negotiated rates with a hotel relatively convenient to the ADA offices while, at least presently, it does not  
6 have the benefit of a negotiated relationship with a Boston-area hotel. Additionally, because of its central  
7 location in the Midwest, the average air travel expenses for council meetings in Chicago might be lower  
8 than air travel expenses for the same meetings in Boston.

9 Following the Council's discussions, the following proposed amendment to Chapter VIII., Section G. of  
10 the *Governance Manual* was arrived at:

11 G. Meetings may be held in the Headquarters ~~Building Offices, the Washington Office~~ other  
12 locations where the Association or its subsidiaries or affiliates maintain offices, or from multiple  
13 remote locations through the use of a conference telephone or other communications equipment  
14 by means of which all members can communicate with each other. Except for the Council on  
15 Government Affairs meeting in ADA facilities in Washington, D.C., any in-person council meeting  
16 in a location other than the Headquarters Offices must be approved in advance by the Executive  
17 Director.

18 The proposed amendment maintains the traditional methods of council meetings, either in-person at the  
19 ADA's Chicago facilities or remotely via telephone conference call or other means such as Teams or  
20 Zoom video conference platforms and recognizes that the Council on Government Affairs periodically  
21 holds meetings at the ADA's Washington Office.\* But unlike the current provision, the amendment  
22 provides the flexibility for councils to meet in other venues where the ADA maintains a presence.  
23 However, in order to guard against councils meeting in locations other than those that they have typically  
24 met in without sufficient justification, the proposed amendment to Chapter VIII., Section G. of the  
25 *Governance Manual* incorporates the requirement of securing the approval of the Executive Director prior  
26 to holding an in-person council meeting in other than the usual locations.

27 In light of the foregoing, the House of Delegates is requested to adopt the following resolution amending  
28 Chapter VIII., Section G. of the *Governance Manual* as indicated in the resolution.

29 **Resolution**

30 **514. Resolved**, that Chapter VIII., Section G. of the *Governance Manual of the American Dental*  
31 *Association* be amended as follows (additions are underscored, deletions are ~~stricken through~~):

32 G. Meetings may be held in the Headquarters ~~Building Offices, the Washington Office~~ other  
33 locations where the Association or its subsidiaries or affiliates maintain offices, or from  
34 multiple remote locations through the use of a conference telephone or other communications  
35 equipment by means of which all members can communicate with each other. Except for the  
36 Council on Government Affairs meeting in ADA facilities in Washington, D.C., any in-person  
37 council meeting in a location other than the Headquarters Offices must be approved in  
38 advance by the Executive Director.

39 **BOARD RECOMMENDATION: Vote Yes.**

40 **BOARD VOTE: UNANIMOUS (BOARD OF TRUSTEES CONSENT CALENDAR ITEM)**

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\* In recognition of the sale of the ADA Headquarters Building in Chicago and the 1111 14<sup>th</sup> Street. N.W. building in Washington, D.C., references to the ADA's Chicago and Washington locations have been revised to "the Headquarters Offices" and "ADA facilities in Washington, D.C.," respectively.



1 expressed frustration about having been named to an Action Group roster and accepting the appointment  
2 but not having been assigned ongoing work. Some reported feeling disconnected from the SFC because  
3 there was no set schedule or cadence for their service.

4 *Virtual Engagement Challenges.* Action Group members reported difficulty with navigating Microsoft  
5 Teams, including frustration with the platform itself and confusion about how to contribute meaningfully.  
6 Many encouraged the use of a simpler method of submitting input on discussion topics. Many members  
7 requested increased numbers of virtual meetings through Zoom to supplement the asynchronous sharing  
8 of information via Teams.

9 *Communication Challenges.* Many Action Group members identified increased communication from the  
10 SFC as an area for improvement. Many reported feeling unsure of how their efforts fit into the bigger  
11 picture of strategic forecasting efforts at the ADA. Respondents requested increased information on how  
12 their assigned discussion questions contribute to the overarching work of the SFC.

13 *Low Participation Rates.* Many Action Group members expressed frustration at low levels of participation  
14 by other members. While the average active Action Group participation rate was 74% in 2024, this rate  
15 dropped to 44% in 2025.

16 *Administrative Challenges.* Although not reflected in the survey results, administrative burden on the  
17 regions to fill and maintain the rosters of Action Group volunteers has been substantial. The efforts  
18 required for each Geographic Trustee District Region to self-organize and set up their own governance  
19 structure through which to select nominees for the various Action Group positions was a lengthy process  
20 following the SFC's inception, with the frequent need to fill vacancies requiring much follow-up work at all  
21 levels of the Tripartite.

22 The SFC believes that the reduced Action Group participation rates, as well as the feedback received  
23 through the Action Group survey and follow-up discussions, necessitates recommending changes to the  
24 Action Group process for the House to consider.

25 The SFC has explored potential changes to the structure of the Action Groups to address such  
26 improvements. In particular, the SFC studied the potential transition of the Action Groups to a more  
27 flexible “call for participation” format. This format could enable the SFC and subcommittees to solicit  
28 feedback and engagement on discussion topics directly from the public (including applicable stakeholder  
29 groups) on a topic-by-topic basis. Such a format would help bring the SFC into alignment with how the  
30 ADA handles information-gathering regarding Standards-related processes.

31 At its July 26, 2025 meeting, the SFC reviewed proposed amendments to the *Manual of the House of*  
32 *Delegates and Supplemental Information* outlining such a structure. Hallmarks of the proposal are as  
33 follows:

- 34 • Retooling the current prescriptive make-up of the Action Groups into a “call for participation”  
35 structure that seeks input from members, stakeholders, subject matter experts, interested parties,  
36 and the public to inform updates to the Strategic Forecast.
- 37 • Creating a mechanism for new ideas to be considered expeditiously through proposing new  
38 Action Groups, which may be suggested by state associations, Trustee districts, the House of  
39 Delegates, councils, commissions, and committees of the House of Delegates, the SFC  
40 subcommittees, the ADA Board of Trustees and committees of the ADA Board of Trustees, and  
41 even individuals.
- 42 • Codifying processes for the SFC to evaluate new Action Groups while promoting collaboration  
43 with, and deference to, other ADA agencies such as councils, to support the work of councils and  
44 avoid duplication of efforts.
- 45 • Equipping the SFC Subcommittees to facilitate topical discussions within the proposed new  
46 Action Groups structure.

1 Key potential advantages to the proposed new Action Group structure are:

- 2 • Leveraging of the cyclical nature of the strategic forecasting process. Volunteers would no longer
- 3 sit on an Action Group roster for the duration of their 2-year term and wait for their next work
- 4 assignment; instead, anyone can choose whether to engage on a particular topic.
- 5 • Broadening the strategic forecasting process to all membership and beyond. The call for
- 6 comments on a topic would be distributed broadly through appropriate ADA communication
- 7 channels, soliciting feedback from members, non-members, the public, and all stakeholders.
- 8 • Reducing the administrative burden of filling and maintaining the current Action Group rosters at
- 9 the regional level by removing the regional representation requirement at the Action Group level
- 10 of the SFC only, allowing Tripartite leadership to focus on substantive work to support the dental
- 11 profession.

12 It is noted that these proposed amendments, if adopted, will be effective at the adjournment *sine die* of  
 13 the 2025 House of Delegates annual session. In light of this recommendation pending before the House,  
 14 all efforts toward addressing upcoming vacancies in the Action Group rosters effective at the close of the  
 15 2025 House have been paused. In the event that the House does not adopt these proposed changes,  
 16 notices will be distributed promptly after the adjournment of the House to start the process of filling such  
 17 vacancies.

18 In addition to proposed amendments to the SFC Action Group structure, this resolution also contains  
 19 some suggested adjustments that are “housekeeping” in nature: updating terminology and correcting  
 20 typos.

21 In light of the foregoing, the SFC recommends the House amend the *Manual of the House of Delegates*  
 22 *and Supplemental Information* by adoption of the following resolution.

### 23 **Resolution**

24 **518. Resolved**, that the Strategic Forecasting Committee charter, as it appears in the section on  
 25 Standing Committees of the House of Delegates in the *Manual of the House of Delegates and*  
 26 *Supplemental Information*, be amended as shown below (additions underscored; deletions ~~stricken~~  
 27 through):

28 *Strategic Forecasting Committee*. The Strategic Forecasting Committee (SFC) and its associated  
 29 entities are generally related to the ongoing provision of ~~strategic plan~~ Strategic Forecast review  
 30 and guidance for the Association. The complete composition, including a subcommittee structure  
 31 and attached action groups, ~~are~~ is outlined below, as well as the specific duties and other  
 32 governance considerations.

33 The inaugural class of the SFC served a one-year appointment as the House of Delegates  
 34 representatives to the Committee. These appointments began at adjournment *sine die* of the  
 35 2022 House of Delegates and ended at adjournment *sine die* of the 2023 House of Delegates.  
 36 Those terms shall not be taken into account toward any calculation with regard to future service  
 37 on the Strategic Forecasting Committee.

38 I. Strategic Forecasting Committee.

39 A. Composition and Eligibility. The Strategic Forecasting Committee shall be composed of  
 40 eight (8) individuals who are members of the House of Delegates at the time of  
 41 nomination, four (4) individuals who are members of the Board of Trustees at the time of  
 42 appointment and one (1) individual who is a new dentist member of the ADA at the time

1 of appointment, each selected, nominated and/or appointed as set forth below.\* The  
2 President, President-elect, Treasurer and ADA Executive Director shall also each serve  
3 as a member of the Strategic Forecasting Committee without the right to vote. No  
4 member of the Committee shall concurrently serve as a member of an Association  
5 council or commission nor shall concurrently serve as a member of another committee of  
6 the House of Delegates. The Committee will also include a chair, who shall be a non-  
7 voting member of the Committee.

8 B. Experience Criteria, Selection, Nomination and Appointment.

9 1. House of Delegates Members.

10 a. Experience Criteria. House of Delegates members of the Strategic Forecasting  
11 Committee shall possess knowledge or experience in one or more of the subject  
12 matter areas of membership, fiscal management, advocacy, dental education,  
13 licensure, science and research, strategic planning, generational trends and  
14 social engagement, dental industry, practice modality trends, governance, and  
15 practice trends.

16 b. Selection and Nomination. To achieve geographic diversity among members of  
17 the Strategic Forecasting Committee, four (4) geographic groups of Trustee  
18 Districts shall each select two eligible members of the House of Delegates from  
19 different constituents within their Districts for nomination to the Strategic  
20 Forecasting Committee and shall forward those nominations to the Board of  
21 Trustees, together with information that summarizes the experience of each  
22 nominee for service on the Committee. The four geographic Trustee District  
23 regions are as follows:

- 24 i. North Geographic Trustee District Region: Districts Six, Seven, Eight and  
25 Nine ("North Region")
- 26 ii. East Geographic Trustee District Region: Districts One, Two, Three, Four  
27 and Sixteen ("East Region")
- 28 iii. West Geographic Trustee District Region: Districts Ten, Eleven, Thirteen  
29 and Fourteen ("West Region"); and
- 30 iv. South Geographic Trustee District Region: Districts Five, Twelve, Fifteen  
31 and Seventeen ("South Region").

32 The District caucus chairs for the Districts within each geographic Trustee  
33 District region shall develop and the Districts shall adopt the process by  
34 which Strategic Forecasting Committee nominees are selected.

35 c. Appointment. The Board of Trustees shall review the nominations and shall vote  
36 on the appointment of each House of Delegates Strategic Forecasting  
37 Committee nominee. Should any nominee not be appointed to serve on the  
38 Committee by the Board of Trustees, the geographic Trustee District region that  
39 nominated the candidate shall forward the identity of a substitute nominee to the  
40 Board of Trustees for its consideration.

41 d. The slate of Strategic Forecasting Committee House of Delegates members shall  
42 be forwarded to the House of Delegates for ratification. Should any member not

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\* In the context of the Strategic Forecasting Committee ~~and action groups~~, the term "new dentist member" shall mean a dentist who received their DDS or DMD degree less than ten (10) years before their selection for appointment to the Strategic Forecasting Committee ~~or one of its action groups~~.

1 be ratified by the House of Delegates, the geographic Trustee District region that  
2 nominated the candidate shall forward the identity of a substitute nominee to the  
3 Board of Trustees for its approval.

4 2. Board of Trustees Members. Four (4) Board of Trustees members, one from each of  
5 the geographic Trustee District regions shall be appointed to the Strategic  
6 Forecasting Committee by the President with the approval of the Board of Trustees.

7 3. New Dentist Member. The New Dentist Committee shall develop and adopt the  
8 process by which it selects a new dentist to serve on the Strategic Forecasting  
9 Committee and shall forward that nomination to the Board of Trustees. The nominee  
10 shall be appointed by vote of the Board of Trustees. Should the new dentist nominee  
11 not be appointed to serve on the Committee by the Board of Trustees, the New  
12 Dentist Committee shall forward the identity of a substitute nominee to the Board of  
13 Trustees for its consideration.

14 C. Term and Tenure.

15 1. House of Delegates and New Dentist Members. House of Delegates members and  
16 the new dentist member of the Strategic Forecasting Committee shall serve one term  
17 of two (2) years and, if continuing as a member of the House of Delegates or  
18 continuing to be qualified as a new dentist, respectively, at the conclusion of the  
19 member's initial term, may be renominated and reappointed once for a total tenure on  
20 the Committee of four (4) years.\*

21 2. Board of Trustees Members. Board of Trustees members of the Strategic  
22 Forecasting Committee shall serve one (1) term of two (2) years and shall not be  
23 eligible for reappointment to the Committee.\*\*

24 D. Removal. A member of the Strategic Forecasting Committee may be removed for cause  
25 by the Board of Trustees.

26 1. Causes for Removal. The following are causes for the removal of a member from the  
27 Strategic Forecasting Committee:

28 a. Continued, gross or willful neglect of the duties of a member;

29 b. Failure to comply with the Association's policies on conflict of interest;

30 c. Failure or refusal to disclose necessary information on matters of Association  
31 business;

32 d. Failure to keep confidential any exclusive information protected by secrecy that  
33 becomes known to the member by reason of the performance of his or her duties  
34 on the Committee's behalf;

35 e. Failure to comply with the Association's professional conduct policy and  
36 prohibition against harassment;

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\* To stagger the terms of the House of Delegates members of the Strategic Forecasting Committee so that fifty percent (50%) of the members turn over each year, the initial term of one Committee member from each geographic Trustee District region shall be three years and shall thereafter revert to the two (2) year term specified in this provision. This footnote shall automatically expire at the adjournment sine die of the 2025 House of Delegates annual session.

\*\* To stagger the terms of the Board of Trustee members of the Strategic Forecasting Committee so that fifty percent (50%) of the members turn over each year, the initial terms of two (2) of the Board of Trustees members appointed by the President shall be three (3) years and shall thereafter revert to the two (2) year term specified in this provision. This footnote shall automatically expire at the adjournment sine die of the 2025 House of Delegates annual session.

- 1 f. Unauthorized expenditures or misuse of Association funds;
- 2 g. Unwarranted attacks on the Association, any of its agencies or any person
- 3 serving the Association in an elected, appointed or employed capacity;
- 4 h. Unwarranted refusal to cooperate with any officer, trustee, Committee member or
- 5 Committee staff;
- 6 i. Misrepresentation of the Association and any person serving the Association in
- 7 an elected, appointed or employed capacity to outside persons;
- 8 j. Being found to have engaged in conduct subject to discipline pursuant to Chapter
- 9 XI of the ADA *Bylaws*;
- 10 k. Violation of the Association's Member Conduct Policy;
- 11 l. Conviction of a felony; and
- 12 m. For Strategic Forecasting Committee members only, lapse of membership.
- 13 2. Procedure for Removal. Before a Committee member is removed for cause, the
- 14 following procedures shall be followed:
  - 15 a. The President shall notify the accused member in writing of the allegations
  - 16 concerning the member's performance or conduct. The written notice shall
  - 17 include a description of the conduct purported to constitute each charge. The
  - 18 accused shall be invited to respond in writing. If the accused member wishes,
  - 19 they may resign their Committee position voluntarily or may request the
  - 20 opportunity to appear before the Board of Trustees to respond to the allegations
  - 21 received. If an appearance is requested, the Board shall schedule it during the
  - 22 next meeting of the Board.
  - 23 b. Formal rules of evidence shall not apply to the appearance to discuss the
  - 24 allegations made, but if requested, the Board of Trustees shall permit the
  - 25 accused member to be assisted by legal counsel. Following the appearance, the
  - 26 Board shall decide by a two thirds (2/3) vote whether the accused member
  - 27 should be removed from the Strategic Forecasting Committee. Every decision
  - 28 that results in removal of a Committee member for cause shall be reduced to
  - 29 writing and shall specify the findings of fact which support the decision to remove
  - 30 the accused member. If a decision to remove a Committee member is made, that
  - 31 action shall create a vacancy that shall be filled in accordance with the Vacancy
  - 32 provisions of these procedures.
- 33 E. Vacancy. Should a vacancy arise on the Strategic Forecasting Committee, the entity that
- 34 selected the member whose position has been vacated shall select a replacement
- 35 member for the remainder of the unexpired term and shall forward that selection to the
- 36 Board of Trustees together with, if applicable, the information that summarizes the basis
- 37 for each nominee's experience that qualifies the nominee to serve on the Committee. The
- 38 Board of Trustees shall then vote on the vacancy appointment. If the vacancy is for a
- 39 House of Delegates or the new dentist position on the Committee, at the conclusion of
- 40 the partial term, the replacement member shall be eligible for reappointment to one
- 41 additional, consecutive two (2) year term. If the vacancy is for a Board of Trustees
- 42 position, if the vacated position has less than fifty percent (50%) of a full two (2) year term
- 43 remaining at the time the successor Committee member is appointed, the successor
- 44 Board of Trustees member may, if otherwise eligible, be nominated and appointed to a
- 45 new, consecutive two (2) year term. If fifty percent (50%) or more of the vacated term

1 remains to be served at the time of the appointment, the successor Board of Trustees  
2 member shall not be eligible for another term.

3 F. Powers. The Strategic Forecasting Committee shall have the power to:

- 4 1. Establish rules and regulations not inconsistent with the ADA *Bylaws* or these  
5 provisions for its own governance.
- 6 2. By a majority vote, request the chair to call and convene a special session of the  
7 Strategic Forecasting Committee.
- 8 3. Remove a member of any subcommittee of the Strategic Forecasting Committee for  
9 cause.
- 10 4. Elect or appoint members of the subcommittees of the Strategic Forecasting  
11 Committee.
- 12 5. Monitor and guide the activities of the subcommittees of the Strategic Forecasting  
13 Committee.
- 14 6. Create action groups to seek input from members, potential members, stakeholders,  
15 subject matter experts, interested parties, and the public about strategic activities of  
16 the Association for the purpose of informing updates to the Strategic Forecast, while  
17 promoting collaboration with, and deference to, other ADA agencies as appropriate.

18 G. Duties. The duties of the Strategic Forecasting Committee shall be:

- 19 1. Periodically review and propose revisions to the mission and vision statements of the  
20 American Dental Association.
- 21 2. Collaborate with the Board of Trustees in setting the strategic direction of the  
22 Association in alignment with the Association's vision and mission statements.
- 23 3. Elect a chair of the Strategic Forecasting Committee.
- 24 4. Annually provide to the House of Delegates a report on the Strategic  
25 ~~Forecast~~ Forecasting Plan, including the progress of each of the strategic initiatives of  
26 the American Dental Association to achieve and confirm the progress for the current  
27 five-year vision.

28 H. Meetings.

- 29 1. Regular Meetings. The Strategic Forecasting Committee shall hold a minimum of four  
30 (4) meetings per year. The number and dates of regular meetings to be held for the  
31 following year shall be determined in advance by the Committee.
- 32 2. Special Meetings. Special meetings of the Strategic Forecasting Committee may be  
33 called at any time either by the chair or at the request of a majority of the voting  
34 members of the Committee, provided notice is given to each member in advance of  
35 the meeting.
- 36 3. Place of Meetings: Regular or special meetings may be held in a single geographic  
37 location or virtually using suitable communications platforms.

38 I. Quorum. A majority of the voting members of the Strategic Forecasting Committee shall  
39 constitute a quorum.

- 1 J. Chair. The chair of the Strategic Forecasting Committee shall be an ADA member  
2 selected biennially by the Strategic Forecasting Committee immediately preceding the  
3 expiration of the term of the current chair from nominations received by the Committee.  
4 The chair shall be a non-voting member of the Committee and shall be eligible to ~~be~~  
5 serve two (2) two-year terms as chair. If the selected chair is a voting member of the  
6 Committee at the time of election, the member shall relinquish voting privileges and a  
7 vacancy on the Committee shall be created, to be filled in accordance with the provisions  
8 of the vacancy provisions of these procedures (Section I.E., above).
- 9 K. Vice Chair. Annually, at its first meeting of the Strategic Forecasting Committee following  
10 the House of Delegates, the Committee shall elect a vice chair of the Strategic  
11 Forecasting Committee. The vice chair shall assume the office of chair until the office of  
12 chair is filled by the Strategic Forecasting Committee in the event of a vacancy in that  
13 office, or if the chair is otherwise unavailable. This member shall retain their right to vote.
- 14 L. Consultants and Staff.
- 15 1. Consultants. The Strategic Forecasting Committee shall have the authority to appoint  
16 consultants as needed to assist it in its duties, in conformity with the ADA *Bylaws* and  
17 the *Governance and Organizational Manual of the American Dental Association*  
18 (*"Governance Manual"*). As a condition of appointment, consultants shall file conflict  
19 of interest statements with the Executive Director of this Association. The Committee  
20 shall also provide notice of the appointment of each consultant to the Board of  
21 Trustees.
- 22 2. Staff. The Executive Director of the Association shall assign such staff as needed to  
23 assist the Committee.
- 24 M. Creation of Action Groups; Review of Action Group Work.
- 25 1. Proposal Process. The Strategic Forecasting Committee shall develop and make  
26 available a process for submitting written proposals to create action groups. The  
27 Strategic Forecasting Committee shall continue to make available a mechanism for  
28 individuals and components to contact the SFC directly with ideas, including, but not  
29 limited to, proposals for action groups. The Strategic Forecasting Committee shall  
30 accept such proposals on a rolling basis and review them with support from staff and  
31 consultants as appropriate.
- 32 2. Review of Proposals for Action Groups.
- 33 a. Collaboration with other ADA Agencies. The Strategic Forecasting Committee  
34 understands the governance structure of the ADA and will collaborate with other  
35 ADA agencies to avoid conflict or duplication of efforts when creating an action  
36 group.
- 37 b. Considerations. The Strategic Forecasting Committee's determination of whether  
38 to create an action group may include, but not be limited to, the following  
39 considerations:
- 40 i. Analysis of whether:
- 41 1. The topic falls within the parameters of the current Strategic Forecast  
42 and, if not, why the topic should be prioritized;

- 1                                   2. The topic is broadly relevant to the profession and/or Association, or its  
2                                   impact has very limited scope (e.g., an issue experienced by one state or  
3                                   specialty); and
- 4                                   3. Any ADA agency or agencies indicate that an action group focused on  
5                                   the topic may be of assistance with their own work on the topic.
- 6                                   ii. Assessment of whether the Strategic Forecasting Committee has the  
7                                   resources necessary to investigate the topic.
- 8                                   iii. Identification of a Strategic Forecasting subcommittee to oversee the process  
9                                   of gathering and synthesizing input, and then report back to the Strategic  
10                                   Forecasting Committee with the information gathered and its  
11                                   recommendations as applicable.
- 12                                3. Creation and Assignment of an Action Group. An action group may be created by a  
13                                majority vote of the Strategic Forecasting Committee, which shall assign the action  
14                                group to a Strategic Forecasting subcommittee and identify any applicable  
15                                parameters, such as a time period for reporting back to the Strategic Forecasting  
16                                Committee and recommendations about specific audiences from whom input should  
17                                be sought.
- 18                                4. Review of Action Group Work.
- 19                                a. Report from the Strategic Forecasting Subcommittee. The Strategic Forecasting  
20                                Committee receives and reviews the assigned Strategic Forecasting  
21                                subcommittee's report and any recommendations from the assigned  
22                                subcommittee.
- 23                                b. Strategic Forecast and Annual Report. The Strategic Forecasting Committee  
24                                may vote to propose changes to the Strategic Forecast, for review and approval  
25                                by the House of Delegates. The annual report to the House of Delegates  
26                                regarding the Strategic Forecast shall include a summary of the work of any and  
27                                all action groups, and recommended changes, if any, to the Strategic Forecast.
- 28                                II. Strategic Forecasting Subcommittees. The Strategic Forecasting Committee shall have the  
29                                authority to establish subcommittees, each of which shall focus on a single category that  
30                                impacts members and entities that engage with the ADA. Initially, there shall be four (4)  
31                                subcommittees, each focusing on one of the following groups: Direct to Dentist, Tripartite,  
32                                Enterprise and Public Profession. As the needs or focus of the Association shift, naming  
33                                additional subcommittees, relabeling of existing subcommittees or sunseting of existing  
34                                subcommittees may be accomplished by a recommendation of the SFC that is placed before  
35                                the ADA Board of Trustees and adopted. Any such new subcommittee recommendation will  
36                                be accompanied by resolution language that is substantially similar to those subcommittees  
37                                already in existence as it names the purpose, composition, term and tenure.
- 38                                A. Composition. Each Strategic Forecasting subcommittee shall be composed of four (4)  
39                                members selected by the Strategic Forecasting Committee from among the House of  
40                                Delegates members of the SFC and two (2) Board of Trustees members from within the  
41                                pool of those Trustees already appointed to the SFC by the President with the approval  
42                                of the Board of Trustees. The New Dentist member shall be appointed to up to two  
43                                subcommittees related to their interests and expertise. Each of the foregoing  
44                                subcommittee members shall have the right to vote. The President, President-elect,  
45                                Treasurer and ADA Executive Director shall also serve as members of each Strategic  
46                                Forecasting subcommittee without the right to vote, except as follows: with regard to the

1                    Enterprise Subcommittee, for actions limited to that subcommittee, the Treasurer shall  
 2                    have voting privileges.

3                    B. Term and Tenure.

4                    1. Non-Board of Trustee Voting Members. Voting members of the Strategic Forecasting  
 5                    subcommittees who are not Board of Trustee members shall serve a term of two (2)  
 6                    years and may be reappointed once for a total tenure on the subcommittee of four (4)  
 7                    years.\*

8                    2. Board of Trustee Members. Board of Trustee members of the Strategic Forecasting  
 9                    subcommittees shall serve one (1) term of two (2) years and shall not be eligible for  
 10                    reappointment to the Committee.\*\* Should one's term on the Board of Trustees end  
 11                    prior to the SFC term, the position will be considered vacated and the President shall  
 12                    name a successor to complete the term.

13                    C. Removal. A member of a Strategic Forecasting subcommittee may be removed by the  
 14                    Strategic Forecasting Committee for any of the causes enumerated in Section I.D.1.,  
 15                    above. When considering the removal of any Strategic Forecasting subcommittee  
 16                    member, the Strategic Forecasting Committee shall follow the procedures outlined in  
 17                    Section I.D.2., above.

18                    D. Vacancies. Should a vacancy on a Strategic Forecasting subcommittee occur, a  
 19                    successor member shall be appointed for the unexpired term. If the previous member  
 20                    was a member of the subcommittee nominated by a geographic Trustee District region,  
 21                    the chair of the Strategic Forecasting Committee shall appoint a successor member  
 22                    nominated by that same region. If the previous member was a Board of Trustees member  
 23                    of the subcommittee, the Board of Trustees shall appoint the successor member. If the  
 24                    successor member remains eligible, the successor member may be reappointed for a  
 25                    single full subcommittee term of two (2) years.

26                    E. Powers. Each Strategic Forecasting subcommittee shall have the power to:

27                    1. Seek review and comment of all interested parties in the form of action groups  
 28                    regarding Direct specific objectives within its the subcommittee's scope of assigned  
 29                    responsibility to its action groups, if any.

30                    2. Name consultants as necessary to assist the subcommittee in addressing its  
 31                    assigned objectives.

32                    3. Request additional staff as necessary to complete its assigned objectives.

33                    4. Assist the Strategic Forecasting Committee in completing tasks within its assigned  
 34                    area of responsibility as requested by the Strategic Forecasting Committee.

35                    F. Duties. Each Strategic Forecasting subcommittee shall have the following duties:

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\* To stagger the terms of the non-Board of Trustee voting members of each Strategic Forecasting subcommittee so that fifty percent (50%) of such members turn over each year, the initial terms of two members shall be three years and shall thereafter revert to the two (2) year term specified in this provision. This footnote shall automatically expire at the adjournment sine die of the 2025 House of Delegates annual session.

\*\* To stagger the terms of the Board of Trustee members of each Strategic Forecasting subcommittee so that fifty percent (50%) of the Board of Trustee members turn over each year, the initial terms of one (1) of the Board of Trustees members appointed by the Board of Trustees shall be three (3) years and shall thereafter revert to the two (2) year term specified in this provision. This footnote shall automatically expire at the adjournment sine die of the 2025 House of Delegates annual session.

- 1 1. Provide information within the scope of its assigned responsibility to the Strategic  
 2 Forecasting Committee as requested by the Strategic Forecasting Committee.
- 3 2. Review, refine, and develop the proposed topic assigned to an action group using the  
 4 parameters identified by the SFC prior to distributing the topic for comment with  
 5 support from staff and consultants as applicable. Engage in thoughtful deliberation  
 6 regarding guidance of work of related Action Groups, placing before them challenges  
 7 and questions designed to encourage substantive exchanges to assist in driving the  
 8 Strategic Forecast.
- 9 3. Use ADA channels to seek written comment about the action group topic as  
 10 appropriate. Such audiences shall be tailored to the specific topic and may include,  
 11 but not be limited to, members, stakeholders, subject matter experts, interested  
 12 parties, and the public. Assimilate information within the scope of its assigned  
 13 responsibility provided to it by its action groups or other entities and provide a  
 14 summary of such information to the strategic Forecasting Committee.
- 15 4. Determine whether a virtual meeting is needed for an action group topic for  
 16 educational and/or information-gathering purposes and facilitate the virtual meeting  
 17 with support from staff and consultants as applicable. No quorum is required for any  
 18 such meeting, and no vote shall be taken.
- 19 ~~5.4-Review all responses received, and develop a report back to the Strategic~~  
 20 ~~Forecasting Committee, including the assigned Strategic Forecasting subcommittee's~~  
 21 ~~recommended changes, if any, to the Strategic Forecast. A copy of the report shall~~  
 22 ~~be provided to an ADA agency or agencies that indicated that the creation of an~~  
 23 ~~action group would assist with their own work on this topic. As requested, but at least~~  
 24 ~~annually, provide the Strategic Forecasting Committee with a report that uses~~  
 25 ~~accepted metrics to provide an accounting of the subcommittee's achievements in~~  
 26 ~~meeting its assigned objectives within the scope of its area of responsibility.~~
- 27 ~~6.5-~~ Assist the Strategic Forecasting Committee in completing tasks within its assigned  
 28 area of responsibility as requested by the Strategic Forecasting Committee.

29 G. Meetings.

- 30 1. Regular Meetings. Each Strategic Forecasting subcommittee shall hold a minimum of  
 31 four (4) meetings per year. The number and dates of regular meetings to be held for  
 32 the following year shall be determined in advance by the subcommittee.
  - 33 2. Special Meetings. Special meetings of the Strategic Forecasting subcommittee may  
 34 be called at any time either by the chair or at the request of a majority of the voting  
 35 members of the subcommittee, provided notice is given to each member in advance  
 36 of the meeting.
  - 37 3. Place of Meetings: Regular and special meetings shall be held virtually via one or  
 38 more suitable communications platforms.
- 39 H. Quorum. A majority of the voting members of the Strategic Forecasting subcommittee  
 40 shall constitute a quorum.
- 41 I. Chair. The chair of each subcommittee shall be selected annually by the Strategic  
 42 Forecasting Committee from among the House of Delegates members of the Strategic  
 43 Forecasting Committee, shall be a member of the subcommittee, and shall have the right  
 44 to vote. The chair of the subcommittee shall be eligible to serve two (2) terms as chair if  
 45 continuing as a voting member of the Strategic Forecasting Committee at the conclusion

1 of the initial term as chair. The Strategic Forecasting Committee chair shall serve as the  
2 chair of the Enterprise Subcommittee. The chair of each subcommittee may act as, or  
3 appoint a voting member of the House of Delegates or an alternate delegate as the chair  
4 of its related action groups.

5 J. Consultants and Staff.

6 1. Consultants. Each Strategic Forecasting subcommittee shall have the authority to  
7 appoint consultants as needed to assist it in fulfilling its duties, in conformity with the  
8 ADA *Bylaws* and the *Governance Manual*. As a condition of appointment, consultants  
9 shall file conflict of interest statements with the Executive Director of this Association.  
10 The subcommittee shall also provide notice of the appointment of each consultant to  
11 the Strategic Forecasting Committee and the Board of Trustees.

12 2. Staff. The Executive Director of the Association shall assign such staff as needed to  
13 assist the subcommittees.

14 III. Action Groups. The Strategic Forecasting Committee shall have the authority to establish  
15 action groups as set forth above.

16 A. Action groups may be proposed by: state associations; trustee districts; the House of  
17 Delegates; councils, commissions, and committees of the House of Delegates; the SFC  
18 subcommittees; the ADA Board of Trustees; and committees of the ADA Board of  
19 Trustees. Individuals and components may contact the Strategic Forecasting Committee  
20 directly with ideas, including, but not limited to, proposals for action groups.

21 B. Members, stakeholders, subject matter experts, interested parties, and the public may  
22 participate and submit comment about any action group topic that is of interest to them.

23 ~~With the exception of the Enterprise subcommittee, each of the Strategic Forecasting~~  
24 ~~subcommittees shall have four (4) action groups. The Enterprise subcommittee shall function~~  
25 ~~as its own action group.~~

26 A. ~~Composition. The action groups for the Strategic Forecasting subcommittees shall have~~  
27 ~~the following composition:~~

28 1. ~~Direct to Dentist Strategic Forecasting Subcommittee Action Groups. The Direct to~~  
29 ~~Dentist Strategic Forecasting subcommittee shall have four (4) geographically based~~  
30 ~~action groups as follows:~~

31 a. ~~North:~~

32 i. ~~One (1) dentist from each of the Trustee Districts within the North Region;~~

33 ii. ~~One (1) constituent or component Executive Director, or a staff person~~  
34 ~~recommended by a constituent or component Executive Director, from each~~  
35 ~~Trustee District within the North Region;~~

36 iii. ~~Two (2) full time faculty members\* from academic institutions within the North~~  
37 ~~Region, except that the faculty members should be from institutions in~~  
38 ~~different Trustee Districts;~~

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\*\_In the context of the Strategic Forecasting action groups, the term "full time faculty member" shall mean one who works more than two (2) days or sixteen (16) hours per week.

- 1                   iv. ~~Two (2) new dentists, each from a different Trustee District within the North~~  
2                   ~~Region; and~~
- 3                   v. ~~Two (2) members of the American Student Dental Association who attend~~  
4                   ~~dental school within the North Region, except that the ASDA members~~  
5                   ~~should attend dental schools in different Trustee Districts.~~
- 6                   b. ~~East:~~
- 7                    i. ~~One (1) dentist from each of the Trustee Districts within the East Region;~~
- 8                    ii. ~~One (1) constituent or component Executive Director, or a staff person~~  
9                    ~~recommended by a constituent or component Executive Director, from each~~  
10                   ~~Trustee District within the East Region;~~
- 11                   iii. ~~Two (2) full time faculty members from academic institutions within the East~~  
12                   ~~Region, except that the faculty members should be from institutions in~~  
13                   ~~different Trustee Districts;~~
- 14                   iv. ~~Two (2) new dentists, each from a different Trustee District within the East~~  
15                   ~~Region; and~~
- 16                   v. ~~Two (2) members of the American Student Dental Association who attend~~  
17                   ~~dental school within the East Region, except that the ASDA members should~~  
18                   ~~attend dental schools in different Trustee Districts.~~
- 19                   c. ~~West:~~
- 20                    i. ~~One (1) dentist from each of the Trustee Districts within the West Region;~~
- 21                    ii. ~~One (1) constituent or component Executive Director, or a staff person~~  
22                    ~~recommended by a constituent or component Executive Director, from each~~  
23                    ~~Trustee District within the West Region;~~
- 24                    iii. ~~Two (2) full time faculty members from academic institutions within the West~~  
25                    ~~Region, except that the faculty members should be from institutions in~~  
26                    ~~different Trustee Districts;~~
- 27                    iv. ~~Two (2) new dentists, each from a different Trustee District within the West~~  
28                    ~~Region, and~~
- 29                    v. ~~Two (2) members of the American Student Dental Association who attend~~  
30                    ~~dental school within the West Region, except that the ASDA members should~~  
31                    ~~attend dental schools in different Trustee Districts.~~
- 32                   d. ~~South:~~
- 33                    i. ~~One (1) dentist from each of the Trustee District within the South Region;~~
- 34                    ii. ~~One (1) constituent or component Executive Director, or a staff person~~  
35                    ~~recommended by a constituent or component Executive Director, from each~~  
36                    ~~Trustee District within the South Region;~~
- 37                    iii. ~~Two (2) full time faculty members from academic institutions within the South~~  
38                    ~~Region, except that the faculty members should be from institutions in~~  
39                    ~~different Trustee Districts;~~

- 1                   iv. ~~Two (2) new dentists, each from a different Trustee District within the South~~  
2                   ~~Region; and~~
  
- 3                   v. ~~Two (2) members of the American Student Dental Association who attend~~  
4                   ~~dental school within the South Region, except that the ASDA members~~  
5                   ~~should attend dental schools in different Trustee Districts.~~
  
- 6                   2. ~~Tripartite Strategic Forecasting Subcommittee Action Groups. The Tripartite Strategic~~  
7                   ~~Forecasting subcommittee shall have four (4) geographically based action groups as~~  
8                   ~~follows:~~
  
- 9                   a. ~~North:~~
  
- 10                   i. ~~One (1) dentist from the North Region, selected according to a process~~  
11                   ~~developed by the caucus chairs and approved by the Trustee Districts of the~~  
12                   ~~North Region;~~
  
- 13                   ii. ~~Two (2) constituent or component Executive Directors, or staff persons~~  
14                   ~~recommended by a constituent or component Executive Director, from each~~  
15                   ~~of the Trustee Districts within the North Region;~~
  
- 16                   iii. ~~One (1) new dentist from the North Region;~~
  
- 17                   iv. ~~One (1) member of the American Student Dental Association who attends~~  
18                   ~~dental school within the North Region;~~
  
- 19                   v. ~~One (1) representative of dental industry who works within the North Region;~~  
20                   ~~and~~
  
- 21                   vi. ~~Two (2) management or administrative representatives of dental service~~  
22                   ~~organizations who work within the North Region, except that such~~  
23                   ~~representatives should be from different Trustee Districts.~~
  
- 24                   b. ~~East:~~
  
- 25                   i. ~~One (1) dentist from the East Region, selected according to a process~~  
26                   ~~developed by the caucus chairs and approved by the Trustee Districts of the~~  
27                   ~~East Region;~~
  
- 28                   ii. ~~Two (2) constituent or component Executive Directors, or staff persons~~  
29                   ~~recommended by constituent or component Executive Directors, from each~~  
30                   ~~of the Trustee Districts within the East Region;~~
  
- 31                   iii. ~~One (1) new dentist from the East Region;~~
  
- 32                   iv. ~~One (1) member of the American Student Dental Association who attends~~  
33                   ~~dental school within the East Region;~~
  
- 34                   v. ~~One (1) representative of the dental industry who works within the East~~  
35                   ~~Region; and~~
  
- 36                   vi. ~~Two (2) management or administrative representatives of dental service~~  
37                   ~~organizations who work within the East Region, except that such~~  
38                   ~~representatives should be from different Trustee Districts.~~
  
- 39                   c. ~~West:~~

- 1                   i. ~~One (1) dentist from the West Region, selected according to a process~~  
2                   ~~developed by the caucus chairs and approved by the Trustee Districts of the~~  
3                   ~~West Region;~~
- 4                   ii. ~~Two (2) constituent or component Executive Directors, or staff persons~~  
5                   ~~recommended by constituent or component Executive Directors, from each~~  
6                   ~~of the Trustee Districts within the West Region;~~
- 7                   iii. ~~One (1) new dentist from the West Region;~~
- 8                   iv. ~~One (1) member of the American Student Dental Association who attends~~  
9                   ~~dental school within the West Region;~~
- 10                  v. ~~One (1) representative of the dental industry who works within the West~~  
11                  ~~Region; and~~
- 12                  vi. ~~Two (2) management or administrative representatives of dental service~~  
13                  ~~organizations who work within the West Region, except that such~~  
14                  ~~representatives should be from different Trustee Districts.~~
- 15                  d. ~~South:~~
- 16                    i. ~~One (1) dentist from the South Region, selected according to a process~~  
17                    ~~developed by the caucus chairs and approved by the Trustee Districts of the~~  
18                    ~~South Region;~~
- 19                    ii. ~~Two (2) constituent or component Executive Directors, or staff persons~~  
20                    ~~recommended by constituent or component Executive Directors, from each~~  
21                    ~~of the Trustee Districts within the South Region;~~
- 22                    iii. ~~One (1) new dentist from the South Region;~~
- 23                    iv. ~~One (1) member of the American Student Dental Association who attends~~  
24                    ~~dental school within the South Region;~~
- 25                    v. ~~One (1) representative of the dental industry who works within South Region;~~  
26                    ~~and~~
- 27                    vi. ~~Two (2) management or administrative representatives of dental service~~  
28                    ~~organizations who work within the South, except that such representatives~~  
29                    ~~should be from different Trustee Districts.~~
- 30                  3. ~~Public Profession Strategic Forecasting Subcommittee Action Groups. The Public~~  
31                  ~~Profession Strategic Forecasting subcommittee shall have four (4) geographically~~  
32                  ~~based action groups as follows:~~
- 33                    a. ~~North:~~
- 34                      i. ~~One (1) dentist from each of the Trustee Districts within the North Region;~~
- 35                      ii. ~~One (1) constituent or component Executive Director, or a staff person~~  
36                      ~~recommended by a constituent or component Executive Director, from each~~  
37                      ~~of the Trustee Districts within the North Region;~~
- 38                      iii. ~~Two (2) full time faculty members from academic institutions within the North~~  
39                      ~~Region, except that the faculty members should be from institutions in~~  
40                      ~~different Trustee Districts;~~

- 1                   iv. ~~Two (2) new dentists, each from different Trustee Districts within the North~~  
2                   ~~Region, and~~
- 3                   v. ~~Two (2) members of the American Student Dental Association who attend~~  
4                   ~~dental school within the North Region, except that the ASDA members~~  
5                   ~~should attend dental schools in different Trustee Districts.~~
- 6                   b. ~~East:~~
- 7                   i. ~~One (1) dentist from each of the Trustee Districts within the East Region;~~
- 8                   ii. ~~One (1) constituent or component Executive Director, or a staff person~~  
9                   ~~recommended by a constituent or component Executive Director, from each~~  
10                   ~~of the Trustee Districts within the East Region;~~
- 11                   iii. ~~Two (2) full time faculty members from academic institutions within the East~~  
12                   ~~Region, except that the faculty members should be from institutions in~~  
13                   ~~different Trustee Districts;~~
- 14                   iv. ~~Two (2) new dentists, different Trustee Districts within the East Region, and~~
- 15                   v. ~~Two (2) members of the American Student Dental Association who attend~~  
16                   ~~dental school within the East Region, except that the ASDA members should~~  
17                   ~~attend dental schools in different Trustee Districts.~~
- 18                   c. ~~West:~~
- 19                   i. ~~One (1) dentist from each of the Trustee Districts within the West Region;~~
- 20                   ii. ~~One (1) constituent or component Executive Director, or a staff person~~  
21                   ~~recommended by a constituent or component Executive Director, from each~~  
22                   ~~of the Trustee Districts within the West Region;~~
- 23                   iii. ~~Two (2) full time faculty members from academic institutions within the West~~  
24                   ~~Region, except that the faculty members should be from institutions in~~  
25                   ~~different Trustee Districts;~~
- 26                   iv. ~~Two (2) new dentists, different Trustee Districts within the West Region, and~~
- 27                   v. ~~Two (2) members of the American Student Dental Association who attend~~  
28                   ~~dental school within the West Region, except that the ASDA members should~~  
29                   ~~attend dental schools in different Trustee Districts.~~
- 30                   d. ~~South:~~
- 31                   i. ~~One (1) dentist from each of the Trustee Districts within the South Region;~~
- 32                   ii. ~~One (1) constituent or component Executive Director, or a staff person~~  
33                   ~~recommended by a constituent or component Executive Director, from each~~  
34                   ~~of the Trustee Districts within the South Region;~~
- 35                   iii. ~~Two (2) full time faculty members from academic institutions within the South~~  
36                   ~~Region, except that the faculty members should be from institutions in~~  
37                   ~~different Trustee Districts;~~
- 38                   iv. ~~Two (2) new dentists, different Trustee Districts within the South Region, and~~



1 eligible, the successor member may be reappointed for a single full action group term of  
2 two (2) years.

3 ~~F. Powers. Each action group shall have the power to:~~

- 4 ~~1. Direct activities to achieve specific and defined objectives.~~
- 5 ~~2. Name consultants as necessary to assist the action group in addressing its~~  
6 ~~assigned objectives; and~~
- 7 ~~3. Request additional staff as necessary to complete its assigned objectives.~~

8 ~~G. Duties. Each action group shall have the following duties:~~

- 9 ~~1. Recommend members to serve on the Strategic Forecasting subcommittees.~~
- 10 ~~2. Provide insights on future trends, outlook and goals to its Strategic Forecasting~~  
11 ~~subcommittee.~~
- 12 ~~3. Provide information, as applicable, to its Strategic Forecasting subcommittee~~  
13 ~~relating to the following areas:~~
  - 14 ~~a. Generational trends and social engagement;~~
  - 15 ~~b. Science and research;~~
  - 16 ~~c. Fiscal management and financial projections;~~
  - 17 ~~d. Dental industry and trends;~~
  - 18 ~~e. Practice trends;~~
  - 19 ~~f. Advocacy;~~
  - 20 ~~g. Current and future social cultural trends and technological interactions;~~  
21 ~~and~~
  - 22 ~~h. Other areas as may be assigned by the Strategic Forecasting~~  
23 ~~subcommittees.~~
- 24 ~~4. Provide metrics to measure and define future strategic goals for the Association.~~
- 25 ~~5. Assist its Strategic Forecasting subcommittee in completing tasks within its~~  
26 ~~assigned area of responsibility as requested by the Strategic Forecasting~~  
27 ~~subcommittee.~~

28 ~~H. Meetings.~~

- 29 ~~1. Regular Meetings. Each action group shall hold meetings as need is determined~~  
30 ~~by the respective Subcommittee. Work of the Action Groups is generally to be~~  
31 ~~accomplished through the use of asynchronous exchanges using suitable virtual~~  
32 ~~platforms, but may be conducted through virtual synchronous meetings.~~
- 33 ~~2. Special Meetings. Special meetings of the action group may be called at any time~~  
34 ~~either by the chair or at the request of a majority of the members of the action~~  
35 ~~group, provided notice is given to each member in advance of the meeting.~~

1                                   3. ~~Place of Meetings. Regular and special meetings shall be held virtually via one or~~  
2                                   ~~more suitable virtual platforms.~~

3                                   I. ~~Quorum. A majority of the voting members of an action group shall constitute a quorum~~  
4                                   ~~for that group.~~

5                                   J. ~~Chair. The chairs of the Direct to Dentist, Tripartite and Public Profession~~  
6                                   ~~Subcommittees, or any other subcommittees subsequently named, may serve as the~~  
7                                   ~~chair, or appoint a voting member of the House of Delegates or an alternate delegate as~~  
8                                   ~~chair of the respective action group. The term shall be concurrent with the term of chair of~~  
9                                   ~~the subcommittee. The Strategic Forecasting Committee chair shall serve as the chair of~~  
10                                   ~~the Enterprise Subcommittee Action Group.~~

11 **BOARD COMMENT:** The ADA Board of Trustees has reviewed the Strategic Forecasting Committee  
12 (SFC) resolution and expresses its appreciation for the Committee's ongoing work. The Board transmits  
13 the resolution for consideration by the House of Delegates.

14 **BOARD RECOMMENDATION: Vote Yes to Transmit.**

15 **BOARD VOTE: UNANIMOUS.**

Resolution No. 521 New

Report: N/A Date Submitted: August 2025

Submitted By: Board of Trustees

Reference Committee: D (Legislative, Governance and Related Matters)

Total Net Financial Implication: None Net Dues Impact: \_\_\_\_\_

Amount One-time: \_\_\_\_\_ Amount On-going: \_\_\_\_\_

ADA Strategic Forecast Outcome: None

1 **PROPOSAL TO MODIFY TIMELINE FOR THE NEXT ADA GOVERNANCE STUDY**

2 **Background:** A governance study should be undertaken at least every 12 years per a resolution adopted  
3 in 2002:

4 **56H-2002. Resolved,** that the American Dental Association examine its governance structure at  
5 least every 12 years.

6 Accordingly, the last governance study was presented to the House of Delegates in 2012, with the next  
7 governance study slated to be presented to the House of Delegates in 2024. However, with the  
8 establishment of the Strategic Forecasting Committee (SFC) in 2022, the Board obtained permission from  
9 the House of Delegates via Resolution 504H-2023, to postpone the next governance study to 2027 in  
10 order to provide the SFC time to establish its work and create the Strategic Forecast before undertaking  
11 the next study. Resolution 504H-2023 reads as follows:

12 **504H-2023. Resolved,** that the ADA recognize that the 2022 House of Delegates establishment  
13 of the Strategic Forecasting Committee has the potential to have impact upon the governance  
14 structure of the Association, and be it further  
15

16 **Resolved,** as Resolution 56H-2002 (*Trans.2002:375*) and Resolution 38H-2011  
17 (*Trans.2011:524*) combine to direct a governance study be completed and for which the results  
18 and recommendations be presented to the 2024 House of Delegates, that any such governance  
19 study instead be deferred such that the results and recommendations be delivered to the 2027  
20 House of Delegates, thus giving the Strategic Forecasting Committee sufficient time for any  
21 governance impact to be reflected in such a study.

22 The substantial progress made by the SFC at the 2024 House of Delegates, particularly the adoption of  
23 the inaugural Strategic Forecast and the reaffirmation of the ADA's mission and vision statements,  
24 suggests that it may be unnecessary to continue postponement of the governance study for another year.  
25 The SFC's joint subcommittees and workgroups across ADA councils and committees continue to work in  
26 bringing the items outlined in the Forecast to life. The governance study could effectively evaluate this  
27 work, assessing its efficiency and impact. To help staff formulate the RFP for the governance study, the  
28 Governance Committee will seek outside assistance from members of the House. Furthermore, since the  
29 adoption of Resolution 504H-2023, significant operational changes have affected the ADA. Delaying the  
30 presentation of a governance study's findings until the 2027 House of Delegates may be considered a lost  
31 opportunity to identify potential benefits, efficiencies, and cost savings that could be realized a full year  
32 sooner. Given the SFC's established work and the ongoing operational changes within the ADA, initiating  
33 a governance study in 2026 seems more beneficial than delaying it.

1 **Resolution**

2 **521. Resolved**, that the next ADA governance study be delivered to the 2026 House of Delegates,  
3 and be it further

4 **Resolved**, that Resolution 504H-2023, Proposal to Postpone the ADA Governance Study to Account  
5 for Strategic Forecasting (*Trans.2023:XXX*), be rescinded.  
6

7 **BOARD RECOMMENDATION: Vote Yes.**

8 **BOARD VOTE: UNANIMOUS.**

Resolution No. 521S-1 Substitute

Report: N/A Date Submitted: 09/25/2025

Submitted By: Ninth Trustee District

Reference Committee: D (Legislative, Governance and Related Matters)

Total Net Financial Implication: None Net Dues Impact: \_\_\_\_\_

Amount One-time: \_\_\_\_\_ Amount Ongoing: \_\_\_\_\_

ADA Strategic Forecast Outcome: None

1 **AMENDMENT TO RESOLUTION 521: PROPOSAL TO MODIFY TIMELINE FOR THE NEXT ADA**  
2 **GOVERNANCE STUDY**

3 The following resolution was submitted on Thursday, September 25, 2025, by Michelle Nichols-Cruz,  
4 governance manager, Michigan Dental Association on behalf of the Ninth Trustee District.

5 **Background:** The ADA has previously explored governance redesign efforts, yet prior proposals have  
6 faced challenges in both development and adoption. To help ensure that the upcoming governance study  
7 produces meaningful, actionable, and broadly supported recommendations, this resolution introduces a  
8 hybrid committee structure and a skills-based selection process for the governance study committee.

9 This approach balances inclusivity with efficiency by:

- 10 1. Broadening Stakeholder Perspectives:  
11 Including early-career dentists, past ADA leaders and/or presidents, state executive directors,  
12 House of Delegates members, and state dental leaders ensures representation across  
13 generations, geographic regions, and leadership experiences. These perspectives will help  
14 identify governance changes that meet the needs of a diverse membership and future-proof the  
15 organization.
- 16 2. Focusing on Skill-Based Selection:  
17 Previous studies have shown that governance redesign requires individuals with vision, strategic  
18 thinking, and organizational design expertise. Developing a recommended skills matrix and an  
19 application to be utilized will ensure a transparent recruitment process and that those appointed  
20 will bring the competencies necessary for innovation and effective decision-making.
- 21 3. Engaging External Expertise:  
22 Including at least one external governance or association management professional brings an  
23 objective, evidence-based perspective. This expert can provide insights from best practices in  
24 other national and nonprofit organizations and help the ADA avoid common pitfalls in governance  
25 redesign.
- 26 4. Balancing Input and Action:  
27 The hybrid structure allows for robust stakeholder engagement while maintaining a core group  
28 responsible for synthesizing input and delivering clear, strategic recommendations to the 2026  
29 ADA House of Delegates. This prevents delays and ensures the study produces actionable  
30 outcomes.

1 By combining representation, expertise, and efficiency, this amended approach gives the governance  
2 study the best chance for success while preserving trust and transparency throughout the process.

3 **Resolution**

4 **521S-1. Resolved**, that the next ADA governance study be delivered to the 2026 House of Delegates  
5 (additions underscored), and be it further

6 Resolved, that the Board of Trustees be urged with considering, but not be limited to including the  
7 following stakeholders in the next governance study.

- 8 1. Individuals with expertise in governance, strategic vision, organizational design, and change  
9 management.  
10 2. Representation from a broad range of stakeholders, including but not limited to:  
11 o Early-career dentists,  
12 o Past ADA leaders and/or past presidents,  
13 o State executive directors,  
14 o Members of the ADA House of Delegates, and  
15 o State dental leaders.

16 Resolved, that the ADA Board of Trustees, in consultation with the Board Committee on  
17 Governance, develop a skills matrix and application to recruit individuals for the hybrid Governance  
18 Committee to ensure a balanced blend of innovation, experience, and diverse perspectives, and be it  
19 further

20 Resolved, that the Governance Committee seek input on implementation of the study's findings from  
21 communities of interest throughout the process while maintaining decision-making efficiency and  
22 strategic focus, and that the final implementation recommendations be delivered to the 2026 ADA  
23 House of Delegates, and be it further

24 **Resolved**, that Resolution 504-2023, Proposal to Postpone the ADA Governance Study to Account  
25 for Strategic Forecasting (*Trans.2023:XXX*), be rescinded.

26 **BOARD RECOMMENDATION: Received after the August 2025 Board of Trustees Meeting.**



1 **Discussion:** The task force assembled by President Kessler consists of the following individuals meeting  
2 the composition requirements set forth in Res. 518H-2024:

- 3 • Dr. Joseph Crowley (Past President)
- 4 • Dr. Christopher Delecki (Trustee district caucus chair)
- 5 • Dr. Jeffrey Kahl (Recent campaign manager for candidate for elective office)
- 6 • Dr. Stephen Morgan (House of Delegates member)
- 7 • Dr. David Manzanares (Recent candidate for elective office)
- 8 • Dr. Kelly Roth (Election Commission member)
- 9 • Dr. Adam Saltz (New dentist member)

10 Dr. Roth, chair of the Council on Ethics, Bylaws and Judicial Affairs and chair of the Election Commission,  
11 served as chair of the task force.

12 As will now be discussed, the task force thoroughly reviewed the current Campaign Rules and thought  
13 “outside the box” (Res. 518H-2024 Worksheet, page 1, line 28) in fashioning revisions that meet the  
14 substantial advances in communications and technology that have occurred since 2018 while being  
15 relatively straightforward and easy to administer to ensure that allegations of violations can be quickly  
16 addressed. Equally importantly, the proposed Campaign Rules advanced by the task force stress the  
17 need to conduct campaigns for elective office fairly, honestly and ethically. The revised Campaign Rules  
18 unanimously proposed by the task force are appended to this report as **Appendix 1**. The proposed  
19 revised Campaign Rules are summarized below, particularly where changes from the processes outlined  
20 in the current Campaign Rules are proposed.

21 **I. General Campaign Principles.** One of the foundational themes that the proposed Campaign Rules  
22 embody is expressed as the aspirational statement that candidates for ADA elective office should conduct  
23 their campaigns “in the most positive, professional, honest and ethical manner possible (**Appendix 1**,  
24 page 5042, lines 28-29). This aspirational result can be achieved by campaigns adhering to the  
25 Campaign Rules and applying the General Principles found at **Appendix 1**, page 5042, lines 31-42.

26 **II. Announcing Candidacy.** The current Campaign Rules are very restrictive with respect to the  
27 announcement of candidacies for the offices of President-elect and Second Vice President. Members  
28 wishing to run for those offices and campaign prior to the election must announce their intent to run for  
29 office at the third meeting of the House of Delegates session preceding the election (current Campaign  
30 Rules, **Appendix 2**, page 5052, paragraph 6). If the announcement is not made then, candidates are still  
31 allowed to be nominated for office at the first meeting of the House of Delegates pursuant to Chapter VI.,  
32 Section B.1. of the *Governance Manual of the American Dental Association (Governance Manual)* but are not  
33 permitted to campaign outside their own trustee district prior to nomination just a few days prior to the  
34 election.

35 The task force believes that limiting the announcement of candidacies for President-elect and Second  
36 Vice President to a point in time during the third meeting of the House of Delegates is too restrictive and  
37 can work to dissuade high quality candidates from running for office. The task force felt that an expansion  
38 of the announcement period would provide individuals who were considering running for elective office  
39 but who were “on the fence” additional time to contemplate the major decision of seeking a national  
40 leadership position in the American Dental Association and investing the substantial time and financial  
41 resources necessary for conducting a campaign for elective office. Further, while debating expanding the  
42 period for announcing candidacies, it was noted that little, if any campaigning occurs between the close of  
43 the House and the end of the year. Thus, the task force does not foresee any detrimental results  
44 occurring from expanding the period for announcing the intent to seek elective office to the end of the  
45 calendar year. The revised Campaign Rules proposed by the task force therefore allows candidates to  
46 announce their intent to run for President-elect or Second Vice President from the floor of the House  
47 during its third meeting but extends the time that such candidacies can be announced to December 31<sup>st</sup>  
48 of that year. (**Appendix 1**, page 5043, lines 4-6). Announcements made during the period from close of  
49 the House through the end of the year under the proposed Rules will be via email to the Executive

1 Director and Secretary of the House with the announcement then posted on the candidate information  
2 page on ADA.org (**Appendix 1**, page 5043, lines 13-18).

3 As is currently the case, individuals intending to seek the elective offices of President-elect or Second  
4 Vice President but not announcing prior to the close of the period for announcements will be able to be  
5 nominated at the first meeting of the House of Delegates pursuant to Chapter VI., Section B.1. of the  
6 *Governance Manual*. Such individuals are not permitted under the proposed revision to the Campaign  
7 Rules to campaign outside their home trustee district before nomination (**Appendix 1**, page 5043, lines  
8 19-25). To facilitate the nominations for previously unannounced candidates and caucuses to schedule  
9 time to meet with those candidates, unannounced candidates are requested to notify the Executive  
10 Director and Secretary of the House of Delegates at least sixty (60) days prior to the start of the annual  
11 session. Under the proposed Campaign Rules, once nominated, previously unannounced candidates who  
12 provide the sixty (60) days' notice will be able to campaign at the annual session before the election  
13 (**Appendix 1**, page 5043, lines 26-36 and page 5044, lines 8-13).

14 Should an individual be nominated for President-elect or Second Vice President at the first meeting of the  
15 House of Delegates who neither announced during the candidate announcement period nor notified the  
16 Executive Director and Secretary of the House of their plans at least sixty (60) days prior to the House's  
17 first meeting, they will forfeit the right to meet with the district caucuses during caucus day and to  
18 participate in any other campaign events that may be scheduled during the House of Delegates session.  
19 In addition, at the discretion of the Speaker of the House of Delegates, their time to address the House  
20 during its first meeting may be shortened from four to two minutes (**Appendix 1**, page 5043, line 34–36  
21 page 5044, line1–6).

22 In the proposed revised Campaign Rules, the announcement and nomination processes for Treasurer  
23 and Speaker of the House of Delegates remain the same as in the current Campaign Rules (**Appendix 1**,  
24 page 5044, lines 7-9).

25 **III. Campaign Activity by Announced President-elect Candidates.** The task force discussed limiting  
26 such President-elect campaign activities to virtual events or instituting a cap on campaign spending, but  
27 ultimately declined to do so. It did construct the revised Campaign Rules to encourage virtual campaign  
28 events to be held and the proposed Campaign Rules also encourage constituent societies to collaborate  
29 in holding joint events by limiting the number of campaign-related events to one per trustee district and to  
30 cooperate on scheduling candidate events for the sake of economy, efficiency and minimizing conflicts  
31 (**Appendix 1**, page 5044, lines 33-42, page 5045, lines 1-11). The logistics of processing and accepting  
32 invitations for campaign events in the proposed revised Campaign Rules are largely unchanged from the  
33 current Campaign Rules.

34 **IV. Campaign Activity by Candidates for Second Vice President, Speaker of the House of**  
35 **Delegates and Treasurer.** The rules governing campaign activity of candidates for Second Vice  
36 President, Speaker of the House of Delegates and Treasurer were modified by the 2024 House of  
37 Delegates; those rules have been incorporated without substantial change in the Campaign Rules  
38 proposed by the task force (see **Appendix 1**, page 5045, lines 36 – 39, page 5046, lines 1-24).

39 **V. Campaigning During the Annual Session of the House of Delegates.** The Campaign Rules  
40 governing campaigning during the annual session proposed by the task force largely carry over without  
41 significant change from the current Campaign Rules, with two exceptions. First, as indicated above,  
42 candidates who did not announce their candidacy during the candidate announcement period following a  
43 House of Delegates session and who failed to notify the Executive Director and Secretary of the House of  
44 Delegates of their intent to be nominated at least sixty days prior to the start of the annual session of the  
45 House should be excluded from meeting with district caucuses and any other campaign events at the  
46 annual session (**Appendix 1**, page 5046, lines 27-30). Also, organizers of candidate visits to the  
47 caucuses are strongly encouraged to cooperate so that an orderly and efficient schedule for the  
48 candidate visits can be achieved (**Appendix 1**, page 5046, lines 37-41).

1 **VI. Provisions Applicable to All Elective Campaigns.** The campaign rules applicable to personal and  
2 ADA business-related travel by candidates carry over from the current Campaign Rules to the Campaign  
3 Rules proposed by the task force relatively unchanged. The same holds true for provisions relating to the  
4 use of hospitality suites and the prohibition against a candidate's district holding receptions at the annual  
5 session prior to the election (**Appendix 1**, page 5047, lines 1-14).

6 **VII. Campaign Communications.** The provisions governing communications by candidates and their  
7 campaigns have been substantially revised and liberalized in the proposed revision to the Campaign  
8 Rules. The proposed Rules encourage candidates to participate in digital and print interviews and to  
9 disseminate those interviews by providing links to them (**Appendix 1**, page 5047, lines 17-19). This  
10 section of the proposed Rules also provides a reminder to the candidates that interviews and articles  
11 should conform to the General Principles included in the Rules. That is, interviews and articles should be  
12 positive, professional, honest and ethical and should (**Appendix 1**, page 5047, lines 20-22 and page  
13 5042, lines 31-42):

- 14 • Be focused on the candidate who is the subject of the article and that candidate's background,  
15 experience and campaign platform;
- 16 • Refrain from negatively commenting on competing candidates or including a comparison between  
17 candidates;
- 18 • Contain only facts that can be objectively verified; and
- 19 • Be immediately corrected if found to include an error or misstatement.

20 The Campaign Rules proposed by the task force also permits far greater use of social media by  
21 candidates than the current Rules. The current Rules permit candidates and campaigns to maintain a  
22 closed group site on Facebook; no other social media presence by candidates is permitted. Under the  
23 Campaign Rules proposed by the task force, candidates may maintain campaign accounts on any social  
24 media platform that (1) allows the prohibition against direct reposting of site contents and prohibits the  
25 posting of comments to the site, and (2) has those prohibitions enabled by the candidates and their  
26 campaigns (**Appendix 1**, page 5047, lines 32-37). The proposed Campaign Rules allow a candidate to  
27 provide a link to the candidate's campaign material; candidates' campaign material will be made  
28 available to delegates and alternate delegates by posting the campaign material links on the candidate  
29 information page of ADA.org (**Appendix 1**, page 5047, lines 38-43, page 5048, lines 1-6). Once again,  
30 candidates are admonished that their campaign material should conform to the General Principles  
31 recited above (**Appendix 1**, page 5048, lines 9-11 and page 5042, lines 31-42).

32 As with the current Campaign Rules, the proposed Rules allow candidates to communicate with  
33 delegates once via email; the email may contain attachment(s) consisting of campaign material  
34 (**Appendix 1**, page 5048, lines 31-40). Like the current Campaign Rules, the Campaign Rules proposed  
35 by the task force also permit each candidate to telephonically (via voice call or text) communicate once  
36 with each delegate and alternate delegate (**Appendix 1**, page 5048, lines 41-42, page 5049, lines 1-2).  
37 Provisions concerning telephonic or videoconference campaign events scheduled by candidates are  
38 carried over from the current Campaign Rules virtually without change (**Appendix 1**, page 5049, lines 7-  
39 20).

40 **VIII. Contributions.** The task force debated whether to include provisions in the Campaign Rules  
41 restricting contributions, either by limiting the size of individual contributions or by placing a cap on the total  
42 amount of money that a campaign can raise. The task force ultimately decided not to provide for  
43 contribution limits in favor of relying on the encouragement provided by the proposed Rules to conduct  
44 combined or regional campaign events (**Appendix 1**, page 5045, lines 1-11) and/or to hold campaign  
45 events using videoconference platforms (**Appendix 1**, page 5044, lines 41-42). The task force did,  
46 however, believe that campaigns should disclose their aggregate contributions and categorized  
47 expenses to the House of Delegates before the election, and modified the Contributions section of the  
48 Campaign Rules accordingly (**Appendix 1**, page 5049, lines 31-36).

49 **IX. Agreements Between Candidates.** Like the Current Campaign Rules, the Rules proposed by the  
50 task force permit candidates to reach campaign agreements between themselves so long as the

1 agreements do not conflict with or contravene the Campaign Rules (**Appendix 1**, page 5049, lines 39-  
 2 42). The proposed Rules also specifically permit agreements between all candidates for a particular  
 3 elective office that (a) narrow any of the Campaign Rules then in effect or (b) forego any of the campaign  
 4 activities permitted under the Campaign Rules (**Appendix 1**, page 5050, lines 1-3).

5 The remaining sections of the Campaign Rules proposed by the task force (Contacting the Election  
 6 Commission, Interpretation of the Campaign Rules, Violations, and Distribution of the Campaign Rules)  
 7 have been incorporated by the task force in its proposed Rules with virtually no change except for their  
 8 location within the Rules.

9 Along with the review of the Campaign Rules, the task force discussed the makeup of the Election  
 10 Commission and believes that no revisions to the composition of the Election Commission are needed.

11 **Conclusion**

12 With the submission of this report and the proposed revised Campaign Rules, the task force has  
 13 completed the charge given to it by the 2024 House of Delegates. The task force believes that the  
 14 proposed Campaign Rules it has developed reflect the both the societal and the technological changes  
 15 that have taken place since the current Campaign Rules were adopted in 2018. Because the proposed  
 16 Rules liberalize the use of social media during campaigns and simplify other aspects of conducting  
 17 campaigns, the task force envisions the revised Campaign Rules that it proposes will be easier to  
 18 administer and enforce. The task force thus urges the House of Delegates to approve the proposed  
 19 Campaign Rules (**Appendix 1**) by adopting the resolution appearing below.

20 **Resolution**

21 **515. Resolved**, that the current Election Commission and Campaign Rules found in the Manual of  
 22 the House of Delegates be rescinded, and be it further

23 **Resolved**, that the Election Commission and Campaign Rules appended to the Report of the  
 24 Campaign Rules Task Force as **Appendix 1** be adopted and take effect immediately upon adoption.

25 **BOARD RECOMMENDATION: Vote Yes.**

26 **Vote: Resolution 515**

BERG	Yes	DOWD	Yes	KNAPP	Yes	STUEFEN	Yes
BOYLE	Yes	GRAHAM	Yes	MANN	Yes	TULAK-GORECKI	Yes
BROWN	Yes	HISEL	Yes	MARKARIAN	Absent	WANAMAKER	Yes
CAMMARATA	Yes	HOWARD	Yes	MERCER	Absent		
CHOPRA	Yes	IRANI	Yes	REAVIS	Absent		
DEL VALLE-SEPÚLVEDA	Yes	KAHL	Absent	ROSATO	Yes		

**Appendix 1****Election Commission and Campaign Rules**

The Election Commission is composed of three members: the immediate past President, and the chair and vice chair of the Council on Ethics, Bylaws and Judicial Affairs (CEBJA). The chair of CEBJA serves as the Election Commission chair. The Speaker and the President-elect's campaign manager or appointee will serve as consultants to the Election Commission, each without the right to vote. Except as provided below, in the event that one of the members is unavailable, a replacement member will be selected by the chair of the Election Commission in consultation with the Election Commission. In the event that the chair is unavailable due to a conflict with a candidate, the vice chair of CEBJA shall serve as chair and shall appoint a replacement member in consultation with the Election Commission. In the event that both the chair and vice chair of CEBJA are unavailable due to conflicts with a candidate, the senior class of CEBJA shall select replacement members and the chair of the Election Commission.

The Election Commission is charged with (1) overseeing and adjudicating contested issues arising under the Election Commission Rules Governing the Conduct of Campaigns for all ADA Elective Offices (the Campaign Rules); (2) informing anyone identified as being under a disciplinary sentence of suspension or probation for violating their duties to the constituent society within whose jurisdiction the member practices or to this Association that they are ineligible to seek elective or appointive office while under that disciplinary sentence; (3) referring any dispute of eligibility to CEBJA; (4) informing the House of any violation of the Campaign Rules; (5) reviewing and proposing revisions to the Campaign Rules as required; and (6) receiving summaries of campaign revenues and expenses from candidates for all ADA elective offices.

The following Campaign Rules govern the announcement and conduct of all campaigns for ADA elective office. All candidates for elective office are required to abide by the Campaign Rules.

**Election Commission Rules Governing the Conduct of Campaigns for all ADA Elective Offices****I. General Campaign Principles**

A. Every candidate for elective office shall conduct their campaign in the most positive, professional, honest and ethical manner possible and will adhere to the General Principles enumerated below. Candidates will also follow the rules and guidelines contained in these Campaign Rules. Every candidate for elective office shall be responsible and accountable for their campaign team conducting themselves in the same positive, professional, honest and ethical manner and their campaign's adherence to the General Principles enumerated below, and the other rules and guidelines contained in these Campaign Rules.

**B. General Principles.**

1. Every candidate for elective office and their campaigns should be focused on the candidate and the candidate's leadership qualifications, proposed solutions to perceived issues, and future plans for the ADA if elected.

2. Every candidate for elective office and their campaigns shall refrain from making negative comments concerning any other candidate and refrain from comparing or contrasting themselves with any other candidate or candidates for elective office.

3. No statements or communications by the candidates and their campaigns that are predicated or rely on the existence of a fact or facts shall be made unless the fact or facts can be objectively verified.

4. Should any communication or message from or on behalf of a candidate be found to contain any erroneous facts or misinformation, it is the candidate's duty and responsibility to remove or correct the communication or message as soon as possible after becoming aware of the error.

**Appendix 1****1 II. Announcing Candidacy for Elective Office****2 A. Announcements of Candidacy for President elect and Second Vice President Made During the Candidate**  
**3 Announcement Period.**

4 1. Candidates for President-elect and Second Vice President may formally announce their intent to run for office during  
5 the period commencing at the third meeting of the annual session of the House of Delegates and ending on December  
6 31<sup>st</sup> of that same year ("the Candidate Announcement Period").

7 2. Candidates intending to announce their candidacy for President-elect or Second Vice President at the third  
8 meeting of the House of Delegates should provide notice of that intent to the Office of the Executive Director  
9 and Secretary of the House of Delegates no later than the evening before the third meeting of the House of  
10 Delegates to facilitate scheduling the announcements.

11 3. Announcements of candidates running for elective office made during the third meeting of the annual session  
12 of the House of Delegates will be by the Speaker of the House of Delegates from the Speaker's podium.

13 4. Notification of candidacy after the close of the House of Delegates during the remainder of the Candidate  
14 Announcement Period will be via email to the ADA executive director and secretary of the House of Delegates. At  
15 a minimum, that notification must include the name of the candidate and an identification of the office being  
16 sought. The Office of the Executive Director and Secretary of the House of Delegates will publish a candidate  
17 roster on the candidate information page of ADA.org listing all candidates from whom notices have been  
18 received.\*

**19 B. Individuals Intending to be Nominated for President-elect and Second Vice President but not Announcing their**  
**20 Candidacies During the Candidate Announcement Period Preceding the Election.**

21 1. Individuals not announcing their candidacy during the Candidate Announcement Period preceding the election  
22 can be nominated for the office of President-elect or Second Vice President at the first meeting of the annual  
23 session of the House of Delegates pursuant to Chapter VI., Section B.1. of the *Governance and Organizational Manual*  
24 *of the American Dental Association (Governance Manual)*. Such candidates:

25 a. Are not permitted to campaign outside their own trustee districts before they are nominated;

26 b. Must notify the executive director and secretary of the House of Delegates of that intent at least sixty  
27 (60) days prior to the date of the first meeting of the House of Delegates. Such notice should include the  
28 name of the prospective candidate and the office for which that individual intends to be nominated. This  
29 timetable is needed to allow planning for and accommodation of candidate speeches during the first  
30 session of the House and provides time for notifying the district caucuses of all candidates for elective  
31 office; and

32 c. Are permitted to campaign at the annual session following their nomination pursuant to the Campaign  
33 Rules below.

34 2. Candidates who fail to notify the executive director and secretary of the House of Delegates of their intent to  
35 be nominated for the office of President-elect or Second Vice President at least sixty (60) days before the first  
36 meeting of the House of Delegates:

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\* The task force understands that in recent years candidates for President-elect are invited to attend meetings of the Board of Trustees after signing a nondisclosure agreement and that last year the candidates were permitted to attend both regular and closed sessions (excluding attorney-client sessions). The task force encourages the Board of Trustees to continue that practice, and extend the practice to inviting Second Vice President, Treasurer and Speaker of the House candidates to the last regular Board of Trustees meeting that precedes the House of Delegates meeting.

**Appendix 1**

- 1 a. Forfeit their right to appear at district caucus meetings convened during the annual session of the  
2 House of Delegates;
- 3 b. Forfeit their right to appear at or participate in any other campaign events held during the annual  
4 session of the House of Delegates; and
- 5 c. May have their presentations to delegates at the first meeting of the House of Delegates shortened  
6 from four (4) to two (2) minutes at the discretion of the Speaker of the House of Delegates.
- 7 C. Candidates for Treasurer and Speaker of the House of Delegates. Announcements of candidacies for the offices of  
8 Treasurer and Speaker of the House of Delegates will be as stated in Chapter VI. Sections B.2. and B.3., respectively, of  
9 the *Governance Manual*.
- 10 D. Caucus Notification. The names of all President-elect and Second Vice President candidates who have notified the  
11 Executive Director and Secretary of the House of Delegates of their intent to be nominated for office and the names of  
12 candidates for Treasurer and Speaker of the House of Delegates will be forwarded by the Office of the Executive Director  
13 and Secretary of the House of Delegates to the chairs of the district caucuses at least forty-five (45) days prior to the  
14 commencement of the House of Delegates session to allow caucuses to plan for potential in-person caucus visits by  
15 candidates during the annual session.
- 16 E. Conflict of Interest Review.
- 17 1. Candidates announcing during the Candidate Announcement Period will provide a completed conflict of interest  
18 statement and current curriculum vitae to the Office of the Executive Director and Secretary of the House of  
19 Delegates when they provide notice of their candidacies. Candidates for Treasurer and Speaker of the House shall  
20 provide a completed conflict of interest statement to the Office of the Executive Director and Secretary of the House  
21 of Delegates when submitting the material supporting their candidacies required by Chapter VI., Section B.2. or B.3.,  
22 respectively, of the *Governance Manual*. Any individual who did not announce their candidacy during the Candidate  
23 Announcement Period but intends to be nominated for President-elect or Second Vice President at the first meeting  
24 of the House of Delegates shall forward a completed conflict of interest statement and a current curriculum vitae  
25 when they submit their notification of intent to be nominated for elective office to the Office of the Executive Director  
26 and Secretary of the House of Delegates pursuant to Article II., Section B.1.b. of these Campaign Rules.
- 27 2. When received, the curriculum vitae and completed conflict of interest statements of the announced candidates  
28 and individuals intending to be nominated for elective office will be reviewed. Candidates and individuals will be  
29 notified of any conflict of interest issues that would arise if they were to be elected.
- 30 **III. Commencement and Conduct of Campaign Activity by Candidates for President-elect**
- 31 A. Before the Close of Candidate Announcement Period. Prior to close of the Candidate Announcement Period,  
32 candidates for President-elect are prohibited from campaigning outside their own trustee districts.
- 33 B. Campaign Activity Following the Close of the Candidate Announcement Period and Before the Annual  
34 Session. Candidates for President-elect who announced their candidacies during the Candidate Announcement  
35 Period may campaign outside their own trustee districts from the conclusion of the Candidate Announcement  
36 Period to the start of the House of Delegates as follows:
- 37 1. A trustee district may invite candidates for President-elect to attend one (1) campaign-related event or  
38 leadership conference held or sponsored by a constituent society within the trustee district or the district  
39 caucus that is scheduled to be held prior to the annual session of the House of Delegates.
- 40 a. All announced President-elect candidates must be invited to the campaign event.
- 41 b. For efficiency and economic purposes, virtual campaign events via videoconference platforms are  
42 strongly encouraged.

**Appendix 1**

1 c. Constituent societies and district caucuses are urged to collaborate to develop and hold campaign  
2 events sponsored by multiple societies or caucuses, for example, regionally based campaign forums. It  
3 is recommended that such events be structured to allow:

4 i. Each candidate to make a presentation of a prescribed length;

5 ii. Members the freedom to ask questions; and

6 iii. Each candidate to respond to questions presented.

7 d. Organizers of campaign events are strongly encouraged to cooperate in scheduling, so an efficient  
8 campaign schedule is achieved, and conflicts are minimized.

9 e. Campaign event invitations should be forwarded to the Office of the ADA Executive Director and  
10 Secretary of the House of Delegates who will distribute invitations to the campaign managers of the  
11 announced candidates.

12 2. Campaign activity by announced President-elect candidates before the annual meeting of the House of  
13 Delegates shall be limited to the following:

14 a. Prior to the annual session of the House of Delegates, candidates will limit their campaign activity to  
15 attending one (1) event per constituent society and/or district caucus to which all announced  
16 candidates have been invited.

17 b. After a district caucus or constituent society invitation is received, representatives of the announced  
18 President-elect candidates should confer and negotiate a mutually agreeable schedule.

19 c. It is the responsibility of the candidates and/or the campaign managers, through coordination  
20 among the campaigns, to determine the candidates' availability and respond directly to the inviting  
21 organizations.

22 d. Except for conflicts due to a religious holiday observed by one or more of the candidates, candidates  
23 should vote on whether to accept an invitation, with a majority vote needed to accept. A tie vote will  
24 result in accepting the invitation.

25 e. If the date of an invitation falls on a religious holiday observed by one of the candidates and that  
26 candidate votes to reject that invitation, the invitation will be declined by all the candidates because of  
27 the religious holiday conflict.

28 f. For events requiring personal attendance, candidates who have scheduling conflicts prohibiting their  
29 personal attendance may, at their option and with the consent of the event organizer or sponsor,  
30 participate in the event via a mutually available videoconference platform.

31 g. After an invitation has been accepted, if an emergency arises and a candidate must cancel their  
32 attendance, the remaining candidates may attend as planned. Candidates who cancel their attendance  
33 at an in-person event due to an emergency may, at their option and with the consent of the event  
34 organizer or sponsor, participate in the event via a videoconference platform available to both the  
35 candidate and the event's sponsor.

36 **IV. Pre-Annual Session Campaign Activity by Candidates for Second Vice President, Treasurer**  
37 **and Speaker of the House of Delegates**

38 A. Candidates for Second Vice President, Treasurer and Speaker of the House of Delegates are not  
39 permitted to travel to campaign events prior to the commencement of House of Delegates annual session.

**Appendix 1**

1 B. District caucuses and constituent societies are permitted to organize and hold virtual candidate events  
2 with announced candidates for Second Vice President, Treasurer and Speaker of the House of Delegates  
3 (“virtual candidate events”) during the two-month period immediately preceding the commencement of  
4 the House of Delegates annual session. The virtual candidate events may be held via a videoconference  
5 platform.

6 C. Invitations for virtual candidate events must be issued to all announced candidates running for the  
7 particular elective office(s) for which virtual candidate event(s) are desired; the invitations should specify  
8 the type of event that will be held (one-on-one, candidate forum, etc.). District caucuses and constituent  
9 societies are urged to collaborate on the dates and times for the virtual candidate events so that  
10 scheduling conflicts are avoided if possible.

11 D. Announced candidates for the offices of Second Vice President, Treasurer and Speaker of the House of  
12 Delegates may accept and attend any such virtual campaign event to which they have been invited to  
13 participate, but only if all announced candidates for the particular elective office involved have been  
14 invited. It is the responsibility of the candidates and/or the campaign managers, through coordination  
15 among the campaigns, to determine the candidates’ availability to participate in the virtual candidate  
16 events and respond directly to the inviting organizations.

17 E. Except for conflicts due to a religious holiday observed by one or more of the candidates, candidates  
18 should vote on whether to accept an invitation to participate in a virtual campaign event, with a majority  
19 vote needed to accept. A tie vote will result in accepting the invitation.

20 F. If the date of a virtual campaign event to which candidates have been invited to participate falls on a  
21 religious holiday observed by one of the candidates and results in a vote to reject that invitation by that  
22 candidate, the invitation will be declined by all the candidates because of that conflict.

23 G. After a virtual candidate event has been accepted by a candidate, if a situation arises that requires the  
24 candidate to cancel their participation in the event, the remaining candidates may participate as planned.

**V. Campaign Activity by Candidates for Elective Office at the Annual Session of the House of Delegates**

25  
26  
27 A. District caucuses may, at their option, invite all candidates for one or more elective office to appear in  
28 person and address the caucus during the annual session. Candidates who do not provide notice of their  
29 intent to seek elective office at least sixty (60) days before the first meeting of the House of Delegates  
30 should not be invited to such events.

31 B. Invitations to address a district caucus should be distributed by the caucus directly to all eligible  
32 candidates for the particular elective office or offices of interest to the caucus. A copy of each invitation  
33 issued should be distributed to the Office of the Executive Director and Secretary of the House of  
34 Delegates.

35 C. Responses to invitations received by candidates for elective office should be sent by the candidate or the  
36 candidate’s campaign to the issuing caucus.

37 D. Organizers of the district caucus campaign visits are strongly encouraged to cooperate with one another  
38 in scheduling campaign visits, so an efficient campaign visitation schedule is achieved, the time of the  
39 candidates is used effectively and travel between caucuses by candidates is minimized. Upon a request by  
40 a majority of the district caucuses made at least thirty (30) days before the start of the annual session, the  
41 ADA will assist the caucuses in developing an efficient campaign visitation schedule.

**VI. Provisions Applicable to All Elective Campaigns**

42

**Appendix 1**

1 A. Nothing in these Campaign Rules shall prevent a candidate from traveling on a personal basis or  
2 attending a meeting, conference or other event in their official ADA capacity. When traveling personally or  
3 as an ADA representative, candidates must notify other candidates of such travel as soon as possible once  
4 the travel has been scheduled.

5 B. Campaigning while personally traveling or attending events as an ADA representative is prohibited.

6 C. Candidates shall not use campaign-sponsored social functions or district caucus hospitality suite/meeting  
7 rooms for campaigning at any regional, national or annual meeting. Candidates can hold campaign strategy  
8 meetings in their district's hospitality suite. Except as permitted in the Campaign Rules, campaign  
9 receptions are not to be held at the House of Delegates annual session. A district that hosts a reception  
10 during the House of Delegates annual session and has a candidate from its district in a contested election  
11 shall not host the reception prior to the officer elections; a reception may be held after the election. Prior to  
12 the election, candidates shall not attend events in or visit any district hospitality suites, except that  
13 candidates may visit the hospitality suite of their own district to attend district-only events or to hold  
14 campaign meetings with their campaign teams.

**VII. Campaign Communications****A. Articles and Interviews.**

17 1. Candidates are encouraged to participate in interviews via digital and/or print media  
18 platforms and should provide delegates and alternate delegates with links or citations to  
19 such interviews whenever possible.

20 2. Candidates for elective office may be interviewed or consent to an article being written  
21 about them subject to the interview or article conforming to the General Principles stated  
22 in Article I. of these Campaign Rules. Articles and interviews concerning why one person would  
23 make a better elective officer will be considered a comparison of candidates and are not permissible.

24 3. Except for a candidate's constituent and component dental society, candidates will notify all  
25 organizations and groups to which they belong of their candidacies and request that they refrain from  
26 distributing or publishing any information or material referencing the campaign or the candidate's  
27 candidacy.

28 4. Scholarly articles written by a candidate and appearing in a peer-reviewed publication and educational  
29 seminars, webinars and presentations by a candidate are permitted so long as there is no reference to the  
30 candidate running for elective office and no mention of the candidate's campaign is made.

**B. Social Media.**

32 1. Candidates and/or their campaigns may maintain accounts or sites on any social media platform that  
33 allows the account holder or site owner to prohibit the direct reposting of site contents and prohibits the  
34 posting of comments on the site.

35 2. Any campaign-related site or account that is controlled or maintained by candidates or their  
36 campaigns must prohibit the posting of comments to the site. The site shall also prohibit the reposting  
37 of site contents.

38 3. Shortly after the close of the Candidate Announcement Period, the ADA will provide the known email  
39 addresses of delegates and alternate delegates to each announced candidate. Using that list, candidates  
40 may notify delegates and alternate delegates of the social media accounts maintained by the candidate or their  
41 campaign. This notification should only contain a listing of the candidate's social media accounts and no other  
42 information and therefore will not count toward the number of interactions allowed between a candidate and an  
43 individual delegate or alternate delegate.

**Appendix 1**

1 4. Following the compilation of the list of certified delegates and alternate delegates who will attend the  
2 House of Delegates session at which the election will occur, the ADA will send the candidate an updated  
3 list of certified delegates and alternate delegates. The candidate can use the updated list to send a  
4 notification of campaign-related social media accounts. This notification should only contain a listing of the  
5 candidate's social media accounts and no other information, and therefore will not count toward the number of  
6 interactions allowed between a candidate and an individual delegate or alternate delegate.

7 5. Each candidate who maintains any campaign-related social media site will provide a list of all such  
8 sites to the Election Commission.

9 6. Only material that is relevant to the campaign shall be posted on candidates' campaign-related social  
10 media sites. All content posted to campaign related social media sites shall adhere to the General Principles  
11 stated in Article I. of these Campaign Rules.

12 7. No surveys or polls shall be used or conducted via a candidate's campaign-related social media sites.

13 8. Personal, non-campaign use of social media by candidates during the campaign for elective office is  
14 permitted but must conform to the General Principles stated in Article I. of these Campaign Rules.

15 C. Campaign Material.

16 1. No printed campaign-related material may be distributed on the floor of the House of Delegates or to  
17 delegates and alternate delegates.

18 2. Candidates may provide the ADA with a hyperlink that directs a user to campaign material of the  
19 candidate. The ADA will provide the hyperlink on the candidate information page on ADA.org. Any material  
20 accessed via the hyperlink will adhere to General Principles stated in Article I. of these Campaign Rules.

21 3. Any campaign material of a candidate that includes photographs or likenesses of or mentions any  
22 non-familial third parties shall be submitted to the ADA Office of the Executive Director and Secretary of  
23 the House of Delegates for review and approval prior to being made accessible to delegates. When  
24 submitting campaign material for review, candidates should indicate whether third party permissions to  
25 use their likenesses have been obtained. The written permissions should be retained by the candidates  
26 and submitted to the ADA only if requested.

27 4. In order to avoid the appearance of an endorsement or sponsorship, campaign material shall not  
28 include any photograph, likeness or mention of any other current officer of the ADA or current member of  
29 the ADA Board of Trustees.

30 D. Individual Communications with Delegates and Alternate Delegates.

31 1. After certified delegate and alternate delegate contact information is received, each  
32 candidate is permitted to individually communicate with each delegate and alternate delegate a single  
33 time via an electronic communication (*i.e.*, email) for the purpose of campaigning, electioneering and  
34 soliciting votes. A third-party vendor may be used to send such electronic communications so long as the  
35 privacy of the email addresses and identities of the recipients are maintained and preserved and there is  
36 no ability to reply to all the recipients of the electronic communication. The candidate's electronic  
37 communication may contain campaign material, either by embedding or attaching the material to the  
38 electronic communication or by providing a hyperlink or hyperlinks that connects to the location of the  
39 material. A brief note of thanks for a campaign contribution or for acting as a host at an event will not be  
40 considered as a communication under this paragraph.

41 2. Each campaign is permitted to individually initiate a telephonic (phone call or text) communication  
42 with each delegate and alternate delegate a single time for the purpose of campaigning, electioneering

**Appendix 1**

1 and soliciting votes following the receipt from the ADA of the list of certified delegate and alternate  
2 delegate contact information.

3 3. Nothing in these Campaign Rules prevents a candidate from communicating regarding matters within  
4 the specific duties of the candidate's position as an ADA officer, member of the Board of Trustees, task  
5 force or work group, as long as the communication is strictly related to such responsibilities, does not  
6 mention the candidate's campaign, and is not used for campaigning, electioneering or soliciting votes.

7 **E. Telephonic and Videoconference Events.**

8 1. Candidates may each schedule up to three (3) telephone or video conference forums or town hall  
9 events during the campaign. The schedule of any such event shall be communicated to the ADA, together  
10 with the instructions and contact information necessary for delegates and alternate delegates to  
11 participate. The ADA will announce the schedule and telephone or video conference information for the  
12 event to delegates and alternate delegates via ADA Connect and provide the information to the Election  
13 Commission members and staff. Candidates may also publicize the forums or town halls via their  
14 campaign social media sites.

15 2. The agenda, format and length of any telephonic or videoconference town hall or forum shall be at the  
16 discretion of the candidate sponsoring the event.

17 3. The event should be conducted pursuant to the General Principles stated in Article I. of  
18 the Campaign Rules. Candidates shall be responsible for ensuring that a screening mechanism is  
19 employed during the event so that broadcasting participant comments or questions that violate this  
20 provision is avoided.

21 **VIII. Contributions**

22 A. Contributions (including money and in-kind services) are acceptable only from individual dentists, family  
23 members and ADA constituent and component dental societies, which includes component branches and  
24 study clubs recognized as part of the constituent society. Contributions from any other sources are not  
25 permissible. No candidate will knowingly accept campaign contributions which create the appearance of  
26 conflict of interest as reflected in the ADA *Bylaws*.

27 B. Any contribution source that could be interpreted to be a conflict of interest or creates the appearance of  
28 a conflict of interest must be reported to the Election Commission. In the event a contribution source is  
29 deemed to be a conflict of interest or creates the appearance of a conflict of interest, the candidates will be  
30 required to return the contribution.

31 C. Not less than thirty (30) days prior to the start of the annual session, each candidate for elective office will  
32 notify the Office of the Executive Director and Secretary of the House of Delegates of (1) the total aggregate  
33 dollar amount of campaign contributions that have been raised or received to date by the campaign, and (2)  
34 the total expenditures of the campaign to date, broken into the categories of (i) travel, (ii) consulting services,  
35 (iii) marketing and campaign material design and production, and (iv) other. Each campaign's contribution  
36 and expense information will be posted on the candidate information page of ADA.org.

37 D. Candidates for all ADA elective offices should submit a summary of campaign contributions and  
38 expenses to the Election Commission at the end of the campaign.

39 **IX. Agreements between Candidates**

40 A. All candidates for a particular elective office can negotiate and enter into an agreement concerning the  
41 conduct of a campaign for that elective office that does not contravene and is not in conflict with the  
42 Campaign Rules.

**Appendix 1**

1 B. Agreements between all candidates for a particular elective office that (a) narrows any of the provisions of  
2 the Campaign Rules or (b) foregoes any of the campaign activities permitted under these Campaign Rules are  
3 permissible.

**4 X. Contacting the Election Commission**

5 Any communications from a candidate or campaign to the Election Commission regarding these Campaign  
6 Rules will be submitted to the chair of the Election Commission via email addressed to  
7 [electioncommission@ada.org](mailto:electioncommission@ada.org) or by such other means as the Election Commission may from time-to-time  
8 specify.

**9 XI. Interpretation of the Campaign Rules**

10 A. If one or more candidates for elective office has a question concerning the interpretation of the Campaign  
11 Rules or whether a particular activity is prohibited or permitted under the Campaign Rules, the following  
12 procedures shall be followed:

13 1. Prior to contacting the Election Commission concerning the question or interpretation, all candidates  
14 for that elective office and/or their campaign managers shall communicate and attempt in good faith to  
15 reach a consensus on the question.

16 2. If a consensus cannot be reached:

17 a. The campaign that raised the issue shall contact the Election Commission (copying the other  
18 candidates for that elective office and their campaign managers) via a brief and succinct email, state  
19 the question or interpretation that has arisen, aver that the campaigns were unable to reach a  
20 consensus on the issue and provide the campaign's position on the issue presented.

21 b. Within three business days of the receipt of the email referenced in Paragraph 2.a., above, any  
22 other campaign for that same elective office desiring to do so shall send the Election Commission a  
23 brief and succinct email setting forth that campaign's position on the question or interpretation  
24 presented to the Election Commission.

25 c. After the time for receiving statements of position has expired, the Election Commission will  
26 consider and decide the issue as promptly as possible and will email the decision to the campaigns  
27 involved. Rulings by the Election Commission are final and non-appealable.

**28 XII. Violations**

29 A. In the event a violation of the Campaign Rules is determined by the Election Commission to have  
30 occurred more than fourteen (14) days prior to the House of Delegates convening, then the Election  
31 Commission, if it cannot resolve the violation between the candidates, shall post a report of the violation in  
32 the House of Delegates section on ADA Connect. In addition, an email reporting on any such violations will  
33 be sent by the Election Commission to each certified delegates and alternate delegates with a working email  
34 address on file with the ADA on or about fourteen (14) days prior to the convening of the House of  
35 Delegates.

36 B. In the event a violation of the Campaign Rules is determined by the Election Commission to have  
37 occurred in the period from fourteen (14) days prior to the convening of the House of Delegates through the  
38 elections of elective officers, then the Election Commission, if it cannot resolve the violation between the  
39 candidates, shall report those violations to the House of Delegates. The report will be given orally by the  
40 Election Commission chair (or a designee of the Election Commission if the chair is absent from the House of  
41 Delegates session) at the first meeting of the House. If violations occur after that meeting, and before the  
42 election, then a report of such violations shall be read to each caucus by a designee of the Election  
43 Commission.

**Appendix 1**

1 C. Should an allegation of a Campaign Rules violation against an individual or entity not affiliated with a  
2 campaign be made, the Election Commission shall review the allegation and determine if a violation has  
3 occurred. If so, the campaign and candidate affected by the infraction will be notified and shall be  
4 responsible for contacting the individual or entity involved and using their best efforts to curtail the violation.

5 **XIII. Distribution of the Campaign Rules**

6 A. To Candidates and Campaigns.

- 7 1. A copy of the current Campaign Rules will be distributed to each candidate as soon as possible  
8 following receipt of their notification of candidacy.
- 9 2. It is each's candidate's responsibility to inform their campaign committee members, and the  
10 constituent executive directors within their trustee districts of these Campaign Rules.
- 11 3. A written acknowledgment of the receipt and distribution of these Campaign Rules must be returned  
12 by a current or prospective candidate to the Election Commission within fourteen (14) days of receiving  
13 the copy of the Campaign Rules.

14 B. To Delegates and Alternate Delegates.

- 15 1. A current copy of the Campaign Rules will be posted each year in the House of Delegates library on  
16 ADA Connect.
- 17 2. A succinct summary of the most important portions of the current Campaign Rules will also be  
18 posted each year in the House of Delegates library on ADA Connect.

19

20 October 2025

**Appendix 2****Election Commission and Campaign Rules**1  
2

3 The following Campaign Rules govern the announcement and conduct of campaigns for ADA elective officers.  
4 These Campaign Rules will be distributed annually to all candidates, delegates, alternate delegates and other  
5 parties of interest. Candidates for elective officers are expected to abide by the Campaign Rules.

**6 Procedures Concerning Interpretation and Distribution of the Campaign Rules**

7 1. To the extent one or more candidates has a question concerning the interpretation of the Campaign Rules or  
8 whether a particular activity is prohibited or permitted under the Campaign Rules, the following procedures shall  
9 be followed:

10 a. Prior to contacting the Election Commission concerning the question or interpretation, candidates and/or  
11 their campaign managers shall communicate and attempt in good faith to reach a consensus on the  
12 question.

13 b. If a consensus cannot be reached:

14 i. The campaign that raised the issue shall contact the Election Commission (copying the other  
15 candidates and their campaign managers) via a brief and succinct email, state the question or  
16 interpretation that has arisen and that the campaigns were unable to reach a consensus on the issue  
17 and provide the campaign's position on the issue presented.

18 ii. Within three business days of the receipt of the email referenced in Paragraph b.i, above, any other  
19 campaign desiring to do so shall send the Election Commission a brief and succinct email setting forth  
20 that campaign's position on the question or interpretation presented to the Election Commission.

21 2. Any communications from a candidate to the Election Commission regarding these Campaign Rules shall be  
22 submitted to the chair of the Election Commission via email addressed to electioncommission@ada.org or by such  
23 other means as the Election Commission may from time-to-time specify.

24 3. Each year, a copy of the current Campaign Rules shall be distributed, signed and acknowledged by all ADA  
25 trustees and elective officers with the agenda and organizational material provided at the first meeting of the  
26 Board of Trustees following adjournment of the House of Delegates. It is the responsibility of each candidate to  
27 inform their campaign committee members, the constituent Executive Directors within their trustee districts and  
28 other constituent staff within their trustee districts who are assisting the campaign of these Campaign Rules within  
29 fourteen (14) days of the candidate's formation of a campaign committee or announcement of candidacy,  
30 whichever first occurs.

31 4. In order to better familiarize ADA delegates and alternate delegates with the Campaign Rules, a succinct  
32 summary of the most important portions of the Campaign Rules will be posted each year in the House of  
33 Delegates library on ADA Connect.

**34 Agreements between Candidates**

35 5. Candidates can negotiate and enter into any agreement concerning the conduct of a campaign for elective  
36 officer that does not contravene and is not in conflict with any of the Campaign Rules contained herein;  
37 agreements between candidates that narrow any of the provisions of these Campaign Rules or agreements by  
38 which the candidates forego any campaign activities permitted under these Campaign Rules are permissible. The  
39 negotiation and enforcement of any such agreement will be the responsibility of the candidates. The Election  
40 Commission will neither facilitate nor enforce any such agreement

41 6. Candidates for President-elect and Second Vice President shall formally announce their intent to run for office  
42 on the final day of the annual session immediately preceding their candidacy. A formal announcement shall  
43 include, at a minimum, the name of the candidate and an identification of the office being sought. Prior to this  
44 formal announcement, candidates may freely campaign within their own trustee districts. Campaign activities

**Appendix 2**

1 outside a candidate's own trustee district shall begin only after the official announcement at the annual session.  
 2 Candidates for President-elect and Second Vice President not formally announcing their candidacies on the last day  
 3 of the annual session immediately preceding their candidacy shall not be permitted to campaign outside their own  
 4 trustee districts but shall be permitted to be nominated for elective office at the annual session of the House of  
 5 Delegates pursuant to Chapter VI., Section B.1. of the *Governance Manual of the American Dental Association*  
 6 (*Governance Manual*).

7 7. Announcements of candidacies for the offices of Treasurer and Speaker of the House of Delegates shall be  
 8 as stated in Chapter VI. Section B.2. and B.3., respectively, of the *Governance Manual*.

**Travel and Meeting Attendance**

9  
 10 8. Candidates for the office of President-elect shall limit their campaign travel to attending state and/or district  
 11 annual meetings and/or leadership conferences and annual session district caucus meetings to which all  
 12 candidates have been invited. The procedures for attendance at such events shall be as

13 follows:

14 a. Candidates for the office of President-elect may accept and attend any such event in a manner mutually  
 15 agreed upon but only if all candidates have been invited.

16 b. District caucuses and state constituent societies shall issue timely invitations to the President-elect  
 17 candidates through the Office of the Executive Director.

18 c. President-elect candidates shall negotiate a mutually agreeable travel schedule. It is the responsibility of  
 19 the candidate and/or the campaign managers, through coordination among the campaigns, to determine the  
 20 candidates' availability and respond directly to the inviting organizations. Except for conflicts due to a  
 21 religious holiday observed by one or more of the candidates, candidates shall vote on whether to accept an  
 22 invitation, with a majority needed to accept; a tie vote will result in accepting the invitation. A religious  
 23 holiday conflict with a single candidate shall result in all the candidates declining the invitation.

24 d. Candidates who have scheduling conflicts prohibiting personal attendance at a district or caucus event  
 25 may, at their option, participate in the event via electronic audio or audiovisual means available to both the  
 26 candidate and the event's sponsor.

27 e. After a meeting has been accepted, if an emergency arises and a candidate must cancel their  
 28 attendance, the remaining candidates may attend as planned. Candidates who cancel their attendance at an  
 29 event due to an emergency may, at their option, participate in the event via electronic audio or audiovisual  
 30 means available to both the candidate and the event's sponsor.

31 9. Candidates for the offices of Second Vice President, Speaker of the House of Delegates and Treasurer shall  
 32 limit campaign travel to attending the district caucus meetings held during the ADA annual session.

33 a. District and state caucuses are permitted to hold virtual candidate meetings with candidates for Second  
 34 Vice President, Treasurer and Speaker of the House of Delegates ("virtual candidate forums") during the two-  
 35 month period immediately preceding the commencement of the Annual Session of the House of Delegates.  
 36 The virtual candidate meetings are to be held via a videoconference platform such as Zoom, Webex, Teams,  
 37 or a similar platform.

38 b. District caucuses and state constituent societies choosing to hold virtual candidate meetings shall issue  
 39 timely invitations to the candidates for Second Vice President, Treasurer and Speaker of the House of  
 40 Delegates through the Office of the Executive Director. Invitations for virtual candidate meetings must be  
 41 issued to all candidates running for the particular elective office(s) for which virtual candidate visits are  
 42 desired; the invitations should specify the type of meeting that will be held (one-on-one, candidate forum,

**Appendix 2**

1 etc.). District caucuses are urged to collaborate in the dates and times for the virtual candidate forums so that  
2 scheduling conflicts are avoided if possible.

3 c. Candidates for the offices of Second Vice President, Treasurer and Speaker of the House of Delegates  
4 may accept and attend any such event in a manner mutually agreed upon, but only if all candidates have  
5 been invited. It is the responsibility of the candidates and/or the campaign managers, through coordination  
6 among the campaigns, to determine the candidates' availability and respond directly to the inviting  
7 organizations.

8 d. After a virtual candidate forum has been accepted by a candidate, if a situation arises that requires the  
9 candidate to cancel their attendance, the remaining candidates may participate as planned.

10 10. Caucuses and state meetings are requested to provide an appropriate opportunity for the candidates to meet  
11 with their members. It is recommended that such forums be structured to allow:

12 a. All candidates to make presentations;

13 b. Caucuses freedom to assess candidates; and

14 c. Each candidate to respond to questions.

15 11. Notwithstanding any of these Campaign Rules, nothing in these Rules shall prevent a candidate from  
16 traveling on a personal basis or attending a meeting, conference or other event as an official ADA representative.  
17 Campaigning while personally traveling or attending events as an ADA representative is strictly prohibited. When  
18 traveling personally or as an ADA representative, candidates shall notify other candidates of such travel as soon as  
19 possible once the travel has been scheduled.

20 12. Candidates shall not use campaign-sponsored social functions or hospitality suite/meeting rooms on behalf of  
21 their candidacy at any regional, national or annual meeting. (This is not intended, however, to limit candidates  
22 from holding campaign meetings for the purpose of strategizing.) Campaign receptions are not to be held at the  
23 ADA Annual Session. Additionally, a district that hosts a reception during the ADA annual session and is  
24 sponsoring a candidate in a contested election shall not host the reception prior to the officer elections; a  
25 reception may be held after the election. Prior to the election, candidates shall not attend events in or visit district  
26 hospitality suites. This prohibition shall not apply to a candidate visiting his or her own district's hospitality suite or  
27 attending events hosted by their own district exclusively for the district's members.

**28 Publications and Media**

29 13. News articles on and interviews of a candidate are permissible if published by a state dental journal. Online  
30 state dental journal news articles on and interviews of a candidate are permissible. Articles about a candidate's  
31 intention to run for office are permissible. Articles about why one person would make a better candidate are not  
32 permissible.

33 14. When announcing their candidacy for elective officer, except for the candidate's constituent and component,  
34 candidates shall notify all organizations and groups to which they belong of their candidacy and shall request that  
35 during the campaign such organizations and groups refrain from distributing or publishing any information or  
36 material referencing the campaign or the candidate's candidacy.

37 15. Candidates shall not participate in interviews on their leadership capacity with leadership or national journals  
38 that will be published within the timeframe of their campaign. Candidates shall not knowingly seek to have their  
39 name, photo, appearance, and writings published in national trade or non-peer reviewed publications or websites  
40 during the campaign, and shall avoid submitting articles in non-peer reviewed paper or electronic publications.  
41 Candidates who are participants in a speaker's bureau or earn revenue by speaking nationally or regionally shall  
42 avoid all unnecessary self-promotion during the campaign related to national speaking engagements.

**Appendix 2****Use of Social Media**

16. In order to facilitate providing information to delegates and alternate delegates by candidates, after announcement of their candidacy, any candidate may establish a closed-group Facebook page for purposes of disseminating information about the candidate's campaign and interacting with delegates and alternate delegates concerning campaign-related subjects and issues. Any such closed-group Facebook page instituted by a candidate shall comply with these Campaign Rules and shall also be governed by the ADA's Social Media Policy and the Social Media Posting Protocol for ADA Officers and Trustees. In the event of a conflict between these Campaign Rules, the Social Media Policy and the Social Media Posting Protocol for ADA Officers and Trustees, these Campaign Rules control.

- a. The Election Commission will determine the appropriate administrative settings for the closed-group campaign Facebook page that candidates may use for campaign-related posts. Those settings will be communicated by the Election Commission to the candidates shortly after the candidates announce their intention to run for elective officer.
- b. Only delegates, alternate delegates, campaign staff and Election Commission members and staff shall be invited to join a candidate's closed-group campaign Facebook page.
- c. Shortly after a candidate's candidacy is announced, the ADA will provide the known email addresses of delegates and alternate delegates. Using that list, invitations to join the closed-group page may be issued via email by a candidate who wishes to initiate a closed-group campaign Facebook page. Invitations to join the closed-group page may also be sent to the candidate's campaign staff and shall be sent to members and staff of the Election Commission.
- d. Following the compilation of the list of certified delegates and alternate delegates who will attend the House of Delegates session at which the election will occur, the ADA will send the candidate an updated list of certified delegates and alternate delegates that the candidate may use to send a second closed-group campaign Facebook page invitation so that newly listed delegates and alternate delegates may join the candidate's closed-group campaign Facebook page.
- e. Only material that is relevant to the campaign shall be posted on a candidate's closed-group campaign Facebook page. No posts that are negative to any opposing candidate or that may be considered to be negative campaigning shall be permitted on the closed-group campaign page. Any candidate who develops a closed-group campaign Facebook page shall be responsible for the monitoring of posts to the page to ensure that posts comply with these Campaign Rules and that the posts are consistent with the ADA's Social Media Policy and the Social Media Posting Protocol for ADA Officers and Trustees.
- f. No surveys or polls shall be used or conducted via a candidate's closed-group campaign Facebook page.
- g. Interactions between a candidate and delegates and alternate delegates using the candidate's closed-group campaign Facebook page shall not count toward any limits on a candidate's contact with individual delegates and alternate delegates contained in these Campaign Rules. 16. Except for the closed-group campaign activity on Facebook specified in Paragraph 15, above, there shall be no campaigning using any social media platform or application.

17. Personal, non-campaign use of social media by candidates during the campaign for elective officer is permitted but candidates shall not post information or material relating to the campaign on personal social media sites. Candidates shall review their personal social media site settings to ensure that privacy and security settings are set to allow review and deletion of any third party post, and candidates shall frequently monitor their own personal Facebook pages and other personal social media sites and delete any posts that references the campaign or the candidate's campaign activities or posts that can be tagged for distribution to third party sites.

**Campaign Literature and Communications to Delegates and Alternate Delegates**

**Appendix 2**

- 1 18. No printed campaign-related material may be distributed in the House of Delegates or to delegates and  
2 alternate delegates.
- 3 19. Candidates may prepare a piece of campaign literature to be electronically distributed to the delegates and  
4 alternate delegates following a candidate's announcement of candidacy for elective officer. Such campaign  
5 literature shall be sized so that if printed the literature is no larger than four single-sided sheets of 8½ x 11 inch  
6 paper. If desired, a second piece of campaign literature or similar length may be electronically distributed to the  
7 delegates and alternate delegates following the candidates' receipt from the ADA of the final list of certified  
8 delegates and alternate delegates.
- 9 20. Each candidate may prepare a video to be distributed as described below to delegates and alternate  
10 delegates and other members of the House of Delegates.
- 11 21. Candidate brochures, videos or other campaign-related communications can include photographs and  
12 likenesses of the candidate, but shall not include any photograph, likeness or mention of any other current officer  
13 of the ADA or current member of the ADA Board of Trustees.
- 14 22. Each piece of literature and any video developed by any candidate shall be submitted to the ADA for review  
15 and approval prior to being distributed. Such literature review may take up to five (5) business days to complete.  
16 Video reviews will be completed as quickly as possible but are dependent on the length of the video. The  
17 candidates shall obtain permissions to use the likeness or image of any non-familial third party that appears in a  
18 piece of campaign literature or in any video. Candidates shall state that such permissions have been obtained  
19 when submitting the literature and any video for review. The permission should be retained by the candidates and  
20 submitted to the ADA only if requested.
- 21 23. Each candidate is permitted to individually communicate with each delegate and alternate delegate a single  
22 time via an electronic communication (i.e., email) for the purpose of campaigning, electioneering and soliciting  
23 votes following the receipt from the ADA of the list of certified delegate and alternate delegate contact  
24 information. A third party vendor may be used to send such electronic communications so long as the privacy of  
25 the email addresses and identities of the recipients are maintained and preserved and there is no ability to reply to  
26 all the recipients of the electronic communication. At each candidate's option, the candidate's electronic  
27 communication may contain the campaign literature and/or video referenced in these Campaign Rules, either by  
28 embedding or attaching the literature and/or the video to the electronic communication or by providing a  
29 hyperlink or hyperlinks that connect to the literature and/or the video that is stored in a remote location  
30 maintained by or on behalf of the candidate.
- 31 24. Each campaign is permitted to individually initiate a telephonic (phone call or text) communication with each  
32 delegate and alternate delegate a single time for the purpose of campaigning, electioneering and soliciting votes  
33 following the receipt from the ADA of the list of certified delegate and alternate delegate contact information.
- 34 25. Nothing in these Campaign Rules shall prevent a candidate from communicating regarding matters within  
35 the specific duties of the candidate's position as an ADA officer, member of the Board of Trustees, task force or  
36 work group, as long as the communication is strictly related to such responsibilities and is not used for  
37 campaigning, electioneering or soliciting votes.
- 38 26. Candidates may each schedule up to three (3) telephone or video conferencing forums or town hall events  
39 during the campaign. A candidate desiring to hold up to three (3) telephone or video conferencing forums or town  
40 hall events shall communicate to the ADA the date of each event and the times at which each such event shall  
41 commence and end, together with the instructions and contact information necessary for participants to email  
42 and/or call with the questions they would like asked during the telephonic town hall. The ADA will announce the  
43 telephone or video conferencing town hall information to delegates and alternate delegates via ADA Connect and  
44 provide the information to the Election Commission members and staff. Candidates may also publicize the  
45 telephonic town halls they sponsor on any closed-group campaign Facebook page that they maintain.

**Appendix 2**

1 27. The agenda for a candidate's telephonic town hall meeting(s) shall be the prerogative of the candidate, with  
2 the candidates being permitted to provide opening and closing statements and whether follow-up questions are  
3 permitted. The length of the telephonic town hall event is also discretionary with the candidate.

4 28. No negative campaigning or negative comments concerning opposing candidates shall be permitted to be  
5 made by the candidate or any participant posing questions or making comments during the town hall event.  
6 Candidates shall be responsible for ensuring that a screening mechanism is employed during the town hall event  
7 so that broadcasting participant comments or questions that violate this provision is avoided.

**Contributions**

8  
9 29. Contributions (including money and in kind services) are acceptable only from individual dentists, family  
10 members and ADA constituent and component dental societies, which includes component branches and study  
11 clubs recognized as part of the constituent society. Contributions from any other sources are not permissible. No  
12 candidate will knowingly accept campaign contributions which create the appearance of conflict of interest as  
13 reflected in the ADA *Bylaws*.

14 30. The sending of a brief note acknowledging a financial contribution or thanking a host of a campaign event to  
15 those contributors or hosts outside of the candidate's district is permitted, as long as no additional campaign  
16 message is included. Such thank you notes may be sent on campaign letterhead or a notecard containing the  
17 campaign logo; envelopes for the thank you note may contain an identification of the campaign or the campaign  
18 logo.

19 31. Any contribution source that could be interpreted to be a conflict of interest or creates the appearance of a  
20 conflict of interest must be reported to the Election Commission and the ADA Board of Trustees. In the event a  
21 contribution source is deemed to be a conflict of interest or creates the appearance of a conflict of interest, the  
22 candidates will be required to return the contribution.

23 32. Candidates for all ADA elective offices should submit a summary of campaign contributions and expenses to  
24 the Election Commission at the end of the campaign.

**Violations**

25  
26 33. In the event a violation of the Campaign Rules is determined by the Election Commission to have occurred  
27 more than fourteen (14) days prior to the House of Delegates convening, then the Election Commission, if it  
28 cannot resolve the violation between the candidates, shall post a report of the violation in the House of Delegates  
29 section on ADA Connect. In addition, an email reporting on any such violations will be sent by the Election  
30 Commission to each certified delegates and alternate delegates with a working email address on file with the ADA  
31 on or about fourteen (14) days prior to the convening of the House of Delegates.

32 34. In the event a violation of the Campaign Rules is determined by the Election Commission to have occurred in  
33 the period from fourteen (14) days prior to the convening of the House of Delegates through the elections of  
34 elective officers, then the Election Commission, if it cannot resolve the violation between the candidates, shall  
35 report those violations to the House of Delegates. The report will be given orally by the Election Commission chair  
36 (or a designee of the Election Commission if the chair is absent from the House of Delegates session) at the first  
37 meeting of the House. If violations occur after that meeting, and before the election, then a report of such  
38 violations shall be read to each caucus by a designee of the Election Commission.

39 35. Should an allegation of a Campaign Rules violation against an individual or entity not affiliated with a  
40 campaign be made, the Election Commission shall review the allegation and determine if a violation has occurred.  
41 If so, the campaign and candidate affected by the infraction will be notified, and shall be responsible for  
42 contacting the individual or entity involved and using their best efforts to curtail the violation.

**Appendix 2**

1 36. In addition to the foregoing notifications of violations, all violations of the Campaign Rules that occur shall be  
2 reported orally at the House of Delegates meeting by the Election Commission.

3 October 2024





1 **BOARD RECOMMENDATION: Vote Yes.**

2 **Vote: Resolution 523**

BERG	Yes	DOWD	Yes	KNAPP	Yes	STUEFEN	Yes
BOYLE	Yes	GRAHAM	Yes	MANN	Yes	TULAK-GORECKI	Yes
BROWN	Yes	HISEL	Yes	MARKARIAN	Absent	WANAMAKER	Yes
CAMMARATA	Yes	HOWARD	Yes	MERCER	Absent		
CHOPRA	Yes	IRANI	Yes	REAVIS	Absent		
DEL VALLE-SEPÚLVEDA	Yes	KAHL	Absent	ROSATO	Yes		

Resolution No. 503 New

Report: N/A Date Submitted: April 3, 2025

Submitted By: Dr. Spencer Bloom, delegate, Illinois

Reference Committee: D (Legislative, Governance and Related Matters)

Total Net Financial Implication: \$75,000 Net Dues Impact: \$1

Amount One-time: \_\_\_\_\_ Amount On-going: \_\_\_\_\_

ADA Strategic Forecast Outcome: Tripartite: Promote Tripartite stability, success, and future growth.

## 1 PROTECTION OF STATE AUTONOMY

2 The following resolution was submitted on Friday, April 3, 2025, by Dr. Spencer Bloom, delegate, Illinois.

3 **Background:** The ADA House of Delegates (HOD) holds exclusive authority to establish official policy for  
4 the American Dental Association. This authority is explicitly defined in the ADA *Bylaws* and reinforced  
5 within the ADA *Governance and Organizational Manual*, which clearly prohibits ADA leadership and staff  
6 from implementing or publicly advocating for any policy, program, partnership, or initiative without formal  
7 approval by the House of Delegates

8 Despite this binding mandate, ADA leadership and administrative staff have repeatedly promoted specific  
9 legislative initiatives, political partnerships, and policy proposals before they were formally approved by  
10 the HOD. This conduct undermines the tripartite structure and erodes trust among members and  
11 constituent societies, particularly when these actions conflict with the will of constituent organizations

12 A prominent example involves the ADA's continued promotion of national licensure compacts. While the  
13 HOD has authorized the exploration of licensure portability in general, it has not approved any specific  
14 compact as ADA policy. Compact-related resolutions have been referred back to councils for further study  
15 and were not adopted by the House of Delegates. Despite this, ADA staff and leadership have publicly  
16 supported one version of a compact in multiple states, including testifying in Maryland in direct opposition  
17 to the position of the Maryland State Dental Association. These public statements occurred without HOD  
18 authorization and in contradiction to constituent society guidance.

- 19 1. Maryland State Dental Association Testimony (opposed):  
20 [https://www.youtube.com/live/NhYr-w\\_Vw3A?t=16350](https://www.youtube.com/live/NhYr-w_Vw3A?t=16350)
- 21 2. ADA Staff Testimony (in support):  
22 [https://www.youtube.com/live/NhYr-w\\_Vw3A?t=18821](https://www.youtube.com/live/NhYr-w_Vw3A?t=18821) [5, 6]

23 Additionally, the ADA entered into a policy development agreement with the National Association of  
24 Dental Plans (NADP) and the National Council of Insurance Legislators (NCOIL) to co-develop national  
25 model Dental Loss Ratio (DLR) legislation, known as the "NCOIL DLR." This agreement—also made  
26 without HOD approval—undermined legislative efforts in Rhode Island, where the dental association had  
27 pursued a different DLR approach modeled after Massachusetts Question 2. This interference was  
28 [documented in a public interview](#) with the President of the Rhode Island Dental Association, who  
29 confirmed that the ADA's support for the NCOIL DLR hampered state-level negotiations.  
30 <https://youtu.be/e-1MRTI6Pk4> [3]

31 As noted above, these actions not only violate ADA policy, but also contradict the ADA *Principles of*  
32 *Ethics and Code of Professional Conduct* requires national leadership to operate with honesty,  
33 transparency, and respect for constituent authority.

1 In addition, Resolution 203H-2024, requires communication with state societies before launching new  
2 initiatives. Furthermore, ADA policy on Legislative Assistance by the Association (*Trans.*1977:948;  
3 1986:530; 2019:310) prohibits advocacy in any state without the expressed consent of that state's dental  
4 society.

5 The below resolution does not oppose compact development or innovation in national policy. This  
6 resolution calls for the ADA to establish a formal process to ensure that any proposed compact,  
7 legislative partnership, or advocacy agreement involving external political entities is reviewed through  
8 appropriate internal channels and brought to the House of Delegates before being promoted as official  
9 ADA policy.

10 Recognizing that the legislative process can move quickly, this resolution does not seek to limit ADA  
11 engagement—it seeks to ensure that such engagement is informed by representative governance. To  
12 support timely and effective advocacy, the ADA should develop and present a range of compact or policy  
13 options with clear legal and professional implications, allowing the House to direct advocacy efforts in  
14 alignment with the profession's priorities.

15 This resolution recommends an amendment to the policy on Legislative Assistance by the Association  
16 (*Trans.*1977:948; 1986:530; 2019:310) and proposes that an ADA quarterly Governance Transparency  
17 Report be published on ADA.org, include the status of referred resolutions, actions taken by councils and  
18 staff, related advocacy or partnership activity, and timelines for updates to the House of Delegates.

## 19 **Resolution**

20 **503. Resolved**, that the ADA policy, Legislative Assistance by the Association (*Trans.*1977:948;  
21 1986:530; 2019:310) be amended as follows (additions underscored; deletions are ~~stricken~~):

22 **Resolved**, that the American Dental Association shall not assist any organization, agency, group  
23 or individual who is attempting to alter the laws of a state without the written consent and  
24 approval of the constituent society, and be it further

25 **Resolved**, that when the American Dental Association is aware of pending legislation within a  
26 state which is in opposition to existing Association policy or is otherwise detrimental to the best  
27 interests of the public, the Association shall inform the constituent society of the implications of  
28 such legislation, urge the constituent society to take appropriate action and offer assistance in  
29 addressing the issue, and be it further

30 **Resolved**, that the ADA shall require that all legislative initiatives, partnerships, model policies,  
31 compacts, or public advocacy efforts with external organizations be formally reviewed and  
32 approved by the House of Delegates before they are publicly promoted or implemented as official  
33 ADA policy; and be it further

34 **Resolved**, that the Association shall support constituent societies when asked to collaborate in  
35 state-level advocacy and shall provide timely guidance if proposed legislation may impact ADA  
36 policy or the public interest.

37  
38 and be it further

39 **Resolved**, that the ADA will publish a quarterly Governance Transparency Report on ADA.org,  
40 which will summarize:

41 1. the progress of referred resolutions,

- 1            2. actions taken by councils and staff,
- 2            3. any related advocacy or partnership activity, and
- 3            4. clear timelines for updates to the House of Delegates.

4    **BOARD COMMENT:** The adoption of Resolution 503 is not feasible as drafted and could significantly  
 5 hinder the ADA’s ability to engage in timely and effective advocacy on behalf of its members. If adopted,  
 6 the resolution would hamstring the Association’s ability to discuss public policy with various groups and  
 7 understand what outside groups intend to present or offer alternatives to those proposals. This could  
 8 result in missed opportunities to influence policy outcomes in ways that protect the profession and benefit  
 9 the patients we serve.

10 Existing governance mechanisms, including the ability of councils and the Board to act within established  
 11 policy parameters, already provide oversight and accountability without compromising the Association’s  
 12 agility in advocacy.

13 **BOARD RECOMMENDATION: Vote No.**

14 **Vote: Resolution 503**

BERG	No	DOWD	No	KNAPP	No	STUEFEN	No
BOYLE	No	GRAHAM	No	MANN	No	TULAK-GORECKI	No
BROWN	No	HISEL	No	MARKARIAN	No	WANAMAKER	No
CAMMARATA	No	HOWARD	No	MERCER	Absent		
CHOPRA	No	IRANI	No	REAVIS	Absent		
DEL VALLE-SEPÚLVEDA	No	KAHL	No	ROSATO	No		

Resolution No. 504 New

Report: N/A Date Submitted: April 4, 2025

Submitted By: Dr. Spencer Bloom, delegate, Illinois

Reference Committee: D (Legislative, Governance and Related Matters)

Total Net Financial Implication: \$225,000 Net Dues Impact: \$3

Amount One-time: \_\_\_\_\_ Amount On-going: \$150,000

ADA Strategic Forecast Outcome: Tripartite: Promote Tripartite stability, success, and future growth.

1 **REINFORCING EDITORIAL INTEGRITY AND TRANSPARENCY BY EMPOWERING THE COUNCIL**  
 2 **ON COMMUNICATIONS**

3 The following resolution was submitted on Friday, April 4, 2025, by Dr. Spencer Bloom, delegate, Illinois.

4 **Background:** This resolution requires an amendment to the *ADA Constitution and Bylaws* to ensure that  
 5 editorial governance is vested in the Council on Communications, as the official member-led body  
 6 charged with ensuring that ADA public-facing communications reflect adopted policy, professional ethics,  
 7 and transparency standards.

8 This resolution does not restrict individual speech or scientific discourse. It ensures that official ADA  
 9 communications—including journals, news publications, emails, and social media—reflect the adopted  
 10 policies and values of the membership. Staff, including dentists employed in staff roles, retain the right to  
 11 express themselves personally. However, if their statements on personal social media or public platforms  
 12 may reasonably be perceived as representing the ADA—especially when professional titles or affiliations  
 13 are used—those statements must meet the same standard of professionalism, neutrality, and policy  
 14 alignment expected of official communications. This is a matter of transparency, accountability, and  
 15 professional ethics—not censorship, consistent with the *ADA Code of Professional Conduct*, which states  
 16 that “professionals have a duty to make known their policies and practices to the public in a manner that  
 17 is truthful, responsible and consistent with the values of the profession”. (*ADA Principles of Ethics and*  
 18 *Code of Professional Conduct*, 2025, Section 5.F.7, p. 16)

19 In recent years, members have raised growing concerns that ADA communication channels are not  
 20 operating in alignment with adopted policy or representative member values. Instead, editorial space in  
 21 flagship publications has been used to promote controversial positions without counterpoint or approval  
 22 by member-led councils. For example, [a 2023 JADA editorial authored by senior ADA staff—including the](#)  
 23 [ADA’s Chief Economist—promoted value-based care as an emerging and desirable trend in dentistry.](#)  
 24 While a rebuttal was later published, no opportunity was provided for a counterpoint to appear at the  
 25 same time, despite widespread member concern that such models increase commodification of care,  
 26 reduce the doctor-patient relationship to a transactional business model, and accelerate the  
 27 commoditization of dentistry, where clinical services become indistinguishable and primarily priced for  
 28 volume. This signals a breakdown in oversight.

29 Member concerns have also been raised regarding content that promotes or appears to normalize  
 30 models of dental care that prioritize business metrics over clinical judgment—such as value-based  
 31 contracting, volume-driven incentives, or third-party ownership models. These trends contribute to the  
 32 commodification and commoditization of dentistry, where professional care is reduced to a transactional  
 33 service and patient relationships are devalued. Similar effects have been documented in other areas of  
 34 health care: private-equity ownership of U.S. hospitals has been linked to worsened patient-reported care  
 35 experience, with a 2.1–5.2 percentage-point decline in “would you recommend” scores over three years

1 post-acquisition, and an increase in hospital-acquired complications including infections and falls (See:  
2 Singh Y, Papanicolas I, Saini V, Jena AB. “Changes in Hospital Adverse Events and Patient Outcomes  
3 Associated With Private Equity Acquisition.” *JAMA*, 2024;331(6):508–517. doi:10.1001/jama.2024.0461.  
4 Available at: <https://pubmed.ncbi.nlm.nih.gov/38147093/>).

5 Value-based care models have also faced criticism for misaligning financial incentives with clinical  
6 autonomy, complicating quality measurement, and imposing administrative burdens—challenges that, if  
7 echoed in dentistry, risk reshaping patient care into a consumer transactional model (See: Moses H,  
8 Matheson DHM. “Value-Based Payment Models for Networks of Care.” *Health Affairs Blog*, 2023.  
9 Available at: <https://www.ncbi.nlm.nih.gov/pmc/articles/PMC10119264/>).

10 While the ADA has not formally defined “commodification” or “commoditization” in policy, members have  
11 expressed concern that these trends erode public trust, compromise autonomy, and undercut the  
12 profession’s ethical foundation (*ADA Principles of Ethics and Code of Professional Conduct*,  
13 Section 3.B.). For this reason, ADA-branded communications should avoid content that could reasonably  
14 be perceived as endorsing such frameworks unless explicitly supported by House-adopted policy.

15 Further concerns have been raised over ADA News and ADA social media accounts publishing content  
16 that appears to highlight corporate-affiliated models—such as DSOs—without offering counterpoint or  
17 oversight by the Council on Communications [More Dentists Affiliating with DSOs – ADA News, June  
18 2023](#). For instance, an August 2023 ADA News article [showcased a periodontist’s decision to sell their  
19 practice and transition into a DSO-affiliated model](#), presented positively and without alternative  
20 viewpoints. These actions undermine the perception of neutrality and pose reputational risks. They also  
21 conflict with professional obligations outlined in the *ADA Code of Professional Conduct*, which states that  
22 “every profession owes society the responsibility to regulate itself,” and requires dentists to observe the  
23 rules of their professional societies [ADA Code of Professional Conduct \(2025\), Section 3.B —  
24 Governance of a Profession, p. 8](#). Additionally, the ADA Constitution and Bylaws establish the House of  
25 Delegates as the Association’s legislative and governing body, the supreme authority for setting official  
26 policy positions. This underscores the importance of ensuring that ADA-branded communications remain  
27 aligned with policies adopted by the membership.

28 The following documents make clear who holds the authority to set official ADA policy, and what  
29 expectations apply to any platform carrying the ADA name.

30 The *Manual of the House of Delegates and Supplemental Information* reinforces the exclusive authority of  
31 the House by stating that “the powers and duties of the House of Delegates, as defined in Chapter III,  
32 Sections 40 and 50, of the *Bylaws*, make it the supreme authoritative body of the Association” (page 8).  
33 This authority includes the power to enact legislation, determine policies, and establish the mission and  
34 vision of the American Dental Association.

35 In addition, the ADA policy *Standards for Dental Society Publications* (*Trans*.1997:303, 660; 2010:602;  
36 2023:XXX) establishes that society publications should inform members on issues of concern,  
37 communicate policies and actions, report professional developments, and maintain balanced content.  
38 While directed primarily at society-published materials, these standards underscore that all ADA-branded  
39 communications should uphold accuracy, fairness, and alignment with policies adopted by the  
40 membership.

41 It is important to recognize that ADA communications reach not only current members, but also  
42 prospective members, the broader dental community, and the general public. The ADA’s Strategic Plan  
43 2020–2025 identifies expanding membership—particularly among underrepresented demographics—as a  
44 core organizational objective. Because communications are central to this effort, content directed at non-  
45 members through ADA.org, social media, and public campaigns should be held to the same standards of  
46 professionalism, accuracy, and alignment with adopted policy as internal member communications.

1 Likewise, editorial content that is primarily dentist-facing—including commentary in ADA News and  
2 JADA—should be reviewed by member dentists to ensure that it reflects the values and voice of the  
3 profession. To support this standard while avoiding operational overload on the Council on  
4 Communications, a standing subcommittee composed of volunteer member dentists should be  
5 established. This subcommittee would serve in an advisory role, assisting with the review of non-scientific  
6 public-facing and dentist-facing content and providing feedback to the Council on Communications. This  
7 model aligns with ADA precedent, where volunteer panels and task forces have historically provided input  
8 on continuing education, public campaigns, and other communication initiatives.

9 While scientific content in JADA is managed by the Editor, other content—such as editorials,  
10 commentaries, and news—currently lacks structured member oversight. ADA News, digital content, email  
11 campaigns, and social media are produced by staff. This resolution strives to find a balance between  
12 professional communication standards and member-driven oversight. It is consistent with the ADA’s core  
13 values of integrity, evidence-based action, and commitment to members as outlined in the ADA Strategic  
14 Plan.

15 To protect the ADA’s reputation, rebuild trust among members, and ensure that all communications  
16 reflect the values and directives of the membership, oversight must be formalized. This resolution seeks  
17 to ensure that content disseminated under the ADA name is consistent with adopted policy, accurately  
18 reflects the Association’s positions, and avoids messaging that could contribute to the commoditization of  
19 the profession.

## 20 **Resolution**

21 **504. Resolved**, that Article IV. GOVERNMENT, of the ADA *Constitution* be amended as follows  
22 (additions underscored):

23 *Section 10. LEGISLATIVE BODY.* The legislative and governing body of this Association shall  
24 be a House of Delegates. In its role as the governing body of this Association, the House of  
25 Delegates shall be responsible for publication decisions over and editorial oversight for all non-  
26 scientific content appearing in any Association publication or communications channel.

27 *Section 20. ADMINISTRATIVE BODY.* The administrative body of this Association shall be a  
28 Board of Trustees.

29 and be it further

30 **Resolved**, that Chapter III. HOUSE OF DELEGATES, *Section 50. DUTIES*, of the ADA Bylaws be  
31 amended as follows (additions underscored):

32 *Section 50. DUTIES:* It shall be the duty of the House of Delegates to:

33  
34 \*\*\*  
35 J. Oversee all non-scientific content, including content relating to ADA policies, advocacy efforts  
36 or legislative agendas, published in ADA journals, periodicals and other communications  
37 channels, including online sites maintained by the Association.

38 and be it further

39 **Resolved**, that Chapter V. BOARD OF TRUSTEES, *Section 70. POWERS*, of the ADA *Bylaws* be  
40 amended as follows (additions underscored, deletions ~~stricken through~~):

41 \*\*\*

1 E. Cause *The Journal of the American Dental Association* to be published as the official  
2 publication of the Association, including appointment of an editor and an editorial board  
3 nominated by the editor.

4 F. Cause to be published such other publications as may be deemed advisable.

5  
6 ~~G. Cause to be published in or omitted from any official publication of the Association any~~  
7 ~~article relating to ADA policies, advocacy efforts or legislative agendas.~~

8 \*\*\*

9 and be it further

10 **Resolved**, that Chapter XIX. PUBLICATIONS, Section A., of the *ADA Governance and*  
11 *Organizational Manual*, be amended as follows (additions underlined, deletions ~~stricken through~~):

12 A. *The Journal of the American Dental Association*. *The Journal of the American Dental*  
13 *Association*, hereinafter referred to as *The Journal*, shall be published with a frequency  
14 and at a subscription rate that shall be determined by the Board of Trustees. The  
15 object of *The Journal* shall be to report, chronicle and evaluate activities of scientific  
16 and professional interest to members of the dental profession. The Editor of *The*  
17 *Journal* shall retain full responsibility for peer-reviewed scientific content. Oversight of  
18 all non-scientific editorial content—including editorials, commentaries, and other  
19 opinion-based material—shall fall under the authority of the ADA Council on  
20 Communications. The Council may carry out this responsibility directly or through a  
21 designated subcommittee of member dentists, consistent with policies adopted by the  
22 House of Delegates. Except as otherwise provided in the powers of the Board of  
23 Trustees in the *ADA Bylaws*, the editor of *The Journal* shall have the authority to  
24 determine its editorial content, including scientific-based content, and shall, with the  
25 assistance of an editorial board, establish and maintain a written editorial policy for  
26 *The Journal*.

27 and be it further

28 **Resolved**, that Chapter XIX. PUBLICATIONS, Section B., of the *ADA Governance and*  
29 *Organizational Manual* be amended as follows (additions underlined, deletions ~~stricken through~~):

30 B. Other Journals. ~~The Association may publish or cause to be published other journals~~  
31 ~~in the field of dentistry subject to the direction and regulations of the Board of~~  
32 ~~Trustees. The Association may publish such other journals or periodicals as may be~~  
33 authorized by the Board of Trustees. Editorial oversight of all non-scientific content in  
34 such publications shall be provided by the Council on Communications or its  
35 designated subcommittee, to ensure consistency with adopted ADA policy and  
36 editorial standards.

37 and be it further

38 **Resolved**, that Chapter VIII. COUNCILS, Section K.2., of the *ADA Governance and Organizational*  
39 *Manual* be amended as follows (additions underlined, deletions ~~stricken through~~):

40 K. Areas of Responsibility.

41 \* \* \*

1           2. Council on Communications. The areas of subject matter responsibility of the Council shall  
2 be:

- 3           a. Advise on the management of the Association’s reputation;  
4           b. Develop, recommend and maintain ADA strategic communications plans;  
5           c. Advise ADA agencies on branding;  
6           d. Advise on prioritization and allocation of communications resources; and  
7           e. Advise on communications and marketing for constituents and components, upon  
8 request-;  
9           f. Serve as the editorial oversight authority for all ADA public-facing and member-facing  
10 non-scientific content, including but not limited to JADA, ADA News, ADA.org, email  
11 newsletters, social media, and other communications platforms. The Council shall  
12 ensure such content reflects House-adopted policy and adheres to established  
13 standards of editorial integrity. The Council shall also ensure that ADA  
14 communication platforms allow for the timely publication of dissenting or alternate  
15 viewpoints in response to editorial or opinion-based content and may establish  
16 standards for how such counterpoints are solicited, selected, and displayed. The  
17 Council may delegate review responsibilities to a standing subcommittee composed  
18 of member dentists, appointed to advise on editorial consistency and fairness; and  
19 g. Include, in its annual report to the House of Delegates reporting on the following:  
20  
21           i. An overview of ADA communications channels, including both public-facing  
22 and member-facing platforms;  
23           ii. A summary of current editorial standards and any updates adopted by the  
24 Council;  
25           iii. Aggregated member feedback on communications content or messaging;  
26           iv. A summary of compliance with House-adopted editorial policy across  
27 platforms; and  
28           v. Any instances of unreviewed non-scientific content found to conflict with ADA  
29 policy and any corrective recommendations made by the Council.

30 and be it further

31 **Resolved**, that ADA staff—including dentists employed in staff roles—shall not use official ADA  
32 communication platforms, including publications, email communications, websites, or social media  
33 accounts, to publish or promote content that conflicts with policy adopted by the House of Delegates  
34 or may reasonably be perceived as undermining the independence of the dental profession or  
35 reducing it to a transactional model of care, and be it further

36 **Resolved**, that when non-scientific content is disseminated without appropriate editorial oversight  
37 and is found to conflict with House-adopted policy or established editorial standards, the Council on  
38 Communications may recommend correction or clarification in consultation with the Executive  
39 Director, and be it further

40 **Resolved**, that if the ADA engages external marketing, media, public relations, or research  
41 consultants to support messaging that may affect public- or dentist-facing editorial content—such as  
42 ADA-branded publications, email communications, or digital platforms—the Council on  
43 Communications shall be notified of the engagement and provided an informational summary of its  
44 scope and purpose, to ensure alignment with adopted editorial policy and the Council’s subject  
45 matter responsibilities.

46 **BOARD COMMENT:** The Board recognizes the importance of editorial integrity and acknowledges the  
47 role of the Council on Communications. As such, the Board unanimously supports Resolution 218 put  
48 forth by the Council on Communications as a more reasonable approach to ensuring integrity in ADA

1 communications. Additionally, the resources that would be needed to support Resolution 504 are cost  
2 prohibitive and would greatly slow ADA real-time communications.

3 **BOARD RECOMMENDATION: Vote No.**

4 **Vote: Resolution 504**

BERG	No	DOWD	No	KNAPP	No	STUEFEN	No
BOYLE	No	GRAHAM	No	MANN	No	TULAK-GORECKI	No
BROWN	No	HISEL	Absent	MARKARIAN	No	WANAMAKER	No
CAMMARATA	No	HOWARD	No	MERCER	No		
CHOPRA	No	IRANI	No	REAVIS	No		
DEL VALLE-SEPÚLVEDA	No	KAHL	No	ROSATO	No		



1 A clear example of this occurred during the 2025 Maryland legislative session. The Maryland State Dental  
2 Association while ADA staff, without ADA House authorization. These public actions directly contradicted  
3 the state's expressed position.

4 • Maryland State Dental Association Testimony (against DDH): [https://www.youtube.com/live/NhYr-  
5 w\\_Vw3A?t=16350](https://www.youtube.com/live/NhYr-w_Vw3A?t=16350)

6 • ADA Staff Testimony (in support of DDH): [https://www.youtube.com/live/NhYr-w\\_Vw3A?t=18821](https://www.youtube.com/live/NhYr-w_Vw3A?t=18821)

7 According to the American Association of Dental Boards' *Response Open Letter to ADA* (March 2025), it  
8 feels that ADA staff and officers made misleading public comparisons between the DDH Compact and the  
9 physician compact, mischaracterized the IDDHL process, and inaccurately dismissed collaborative  
10 invitations made by the AADB.

11 If this characterization of events is accurate and unbiased, such conduct could violate both ADA ethics  
12 and policy. The ADA *Principles of Ethics and Code of Professional Conduct* obligates governance to  
13 operate with honesty, transparency, and respect for the profession's integrity.

14 The regulation of professional licenses, including dental licensure, is a matter of state sovereignty and  
15 ensures that practitioners meet the unique standards and requirements established by each state; The  
16 American Dental Association has proposed adopting the DDH Compact advocating for automatic  
17 acceptance of dental licenses across state line without the explicit consent of the receiving state; such a  
18 policy may override state-specific qualifications, continuing education requirements, and consumer  
19 protections designed to maintain high standards of dental care for residents; the unilateral implementation  
20 of national dental licensure reciprocity could result in a dilution of local regulatory authority and hinder  
21 state enforcement mechanisms. Unique embedded cultures of the residents of each state must not be  
22 ignored or violated.

23 Additionally, ADA's longstanding policy on Legislative Assistance by the Association (*Trans.*1977:948;  
24 1986:530; 2019:310) below clearly prohibits the ADA from assisting with legislative changes in a state  
25 without the consent of that state's constituent society. This policy further states that when the ADA  
26 identifies legislation that may conflict with ADA policy or harm the public interest, it must notify and support  
27 the state—not override it.

#### 28 **Legislative Assistance by the Association (*Trans.*1977:948; 1986:530; 2019:310)**

29 **Resolved**, that the American Dental Association shall not assist any organization, agency, group or  
30 individual who is attempting to alter the laws of a state without the consent and approval of the  
31 constituent society, and be it further

32 **Resolved**, that when the American Dental Association is aware of pending legislation within a state  
33 which is in opposition to existing Association policy or is otherwise detrimental to the best interests of  
34 the public, the Association shall inform the constituent society of the implications of such legislation,  
35 urge the constituent society to take appropriate action and offer assistance in addressing the issue.

36 This proposed resolution does not seek to prevent compact development or constrain progress. Rather, it  
37 reinforces ethical governance by clarifying that no specific compact or partnership should be advanced  
38 unless and until it has been formally approved by the House of Delegates. This resolution may serve as  
39 an amendment or clarification to existing ADA policy to protect the tripartite system and uphold the  
40 House's authority.

1 **Resolution**

2 **505. Resolved**, that while the ADA House of Delegates has authorized the exploration of licensure  
 3 portability through compact models, the ADA shall not promote, publicly advocate for, announce  
 4 partnerships, or assist in the implementation of any specific compact, policy, program, product,  
 5 legislative initiative, or external partnership, and be it further

6 **Resolved**, that the ADA shall publish a quarterly accountability report, accessible on ADA.org and  
 7 ADA Connect, which:

- 8 1. Clearly summarizes the status and disposition of all resolutions referred to councils,  
 9 including explicit progress updates, documentation of staff and council actions;
- 10 2. Discloses any public advocacy or partnership activities undertaken related to referred  
 11 resolutions; and
- 12 3. Includes projected timelines for recommendations returning to the House of Delegates.

13 **BOARD COMMENT:** The adoption of Resolution 505 is not feasible as drafted and could significantly  
 14 hinder the ADA’s ability to engage in timely and effective advocacy on behalf of its members. If adopted,  
 15 the resolution would hamstring the Association’s ability to discuss public policy with various groups and  
 16 understand what outside groups intend to present or offer alternatives to those proposals. This could result  
 17 in missed opportunities to influence policy outcomes in ways that protect the profession and benefit the  
 18 patients we serve.

19 Existing governance mechanisms, including the ability of councils and the Board to act within established  
 20 policy parameters, already provide oversight and accountability without compromising the Association’s  
 21 agility in advocacy.

22 **BOARD RECOMMENDATION: Vote No.**

23 **Vote: Resolution 505**

BERG	No	DOWD	No	KNAPP	No	STUEFEN	No
BOYLE	No	GRAHAM	No	MANN	No	TULAK-GORECKI	No
BROWN	No	HISEL	No	MARKARIAN	No	WANAMAKER	No
CAMMARATA	No	HOWARD	No	MERCER	Absent		
CHOPRA	No	IRANI	No	REAVIS	Absent		
DEL VALLE-SEPÚLVEDA	No	KAHL	No	ROSATO	No		



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**Resolution**

**506. Resolved**, that the Election Commission and Campaign Rules be amended by the addition of a new section titled Candidate Eligibility to be placed before the section titled Election Commission Rules Governing the Conduct of Campaigns for all ADA Elective Officers to read as follows (additions underlined, deletions ~~stricken through~~):

**Candidate Eligibility**

Only an active, life or retired member, in good standing, of this Association shall be eligible to serve as an elective officer. Current members of the Board of Trustees and the Speaker of the House of Delegates are not eligible to run for elective office for a period of one year after completing their term of service on the Board of Trustees. This eligibility limitation does not apply to the Treasurer and/or Speaker when running for a second consecutive three-year term as provided in Chapter VI. ELECTIVE OFFICERS OF THE ASSOCIATION, of the Governance and Organization Manual.

and be it further

**Resolved**, that the American Dental Association *Governance and Organizational Manual*, Chapter VI. ELECTIVE OFFICERS OF THE ASSOCIATION, Section A. Eligibility, be amended to read as follows (additions underlined, deletions ~~stricken through~~):

A. Eligibility. Only an active, life or retired member, in good standing, of this Association shall be eligible to serve as an elective officer. No trustee or other elected officer is eligible to serve simultaneously as Treasurer or Speaker of the House of Delegates. Current members of the Board of Trustees and the Speaker of the House are not eligible to run for elective office for a period of one year after completing their term of service on the Board of Trustees. This eligibility limitation does not apply to the Treasurer and/or Speaker when running for a second consecutive three-year term.

and be it further

**Resolved**, that this Resolution shall take effect at the close of the 2025 House of Delegates.

**BOARD COMMENT:** The Board thanks the author of this resolution. However, it respectfully disagrees with the intent of Resolution 506. Trustees are elected by their districts who put the best individuals forward to serve at the national level. Equally, the House elects its best candidates for president-elect, second vice president, treasurer and speaker of the House. The first obligation of ADA officers, trustees and the speaker of the House is to serve in their elected capacity. However, this service should not preclude sitting members from running as candidates for higher office. They can do both.

The Board believes that the House should be allowed to elect the best candidate. By eliminating the ability to run for office of president-elect, sitting officers and trustees, who have gained experience, knowledge and capacity during their years of service to the ADA, may be discouraged from running for a higher office. If that were to occur, the Association would be deprived of able and qualified candidates.

For these reasons, the Board does not support this resolution.

1 **BOARD RECOMMENDATION: Vote No.**

2 **Vote: Resolution 506**

BERG	No	DOWD	No	KNAPP	No	STUEFEN	No
BOYLE	No	GRAHAM	No	MANN	No	TULAK-GORECKI	No
BROWN	No	HISEL	No	MARKARIAN	No	WANAMAKER	No
CAMMARATA	No	HOWARD	No	MERCER	Absent		
CHOPRA	No	IRANI	No	REAVIS	Absent		
DEL VALLE-SEPÚLVEDA	No	KAHL	No	ROSATO	Yes		

Resolution No. 508 New

Report: N/A Date Submitted: June 29, 2025

Submitted By: Dr. Spencer Bloom, delegate, Illinois

Reference Committee: D (Legislative, Governance and Related Matters)

Total Net Financial Implication: None Net Dues Impact: \_\_\_\_\_

Amount One-time: \_\_\_\_\_ Amount On-going: \_\_\_\_\_

ADA Strategic Forecast Outcome: Tripartite: Achieve a stable and successful Tripartite.

1 **AMENDMENT TO THE ADA ELECTION COMMISSION AND CAMPAIGN RULES**

2 The following resolution was submitted on Sunday, June 29, 2025, by Dr. Spencer Bloom, delegate,  
3 Illinois.

4 **Background:** This resolution is comprehensive because it consolidates, modernizes, and reforms the  
5 entire ADA Election Commission and Campaign Rules to reflect current expectations of fairness, equity,  
6 and nonprofit compliance. We have provided full documentation for transparency and ease of review:

- 7 • **Appendix A:** A side-by-side table comparing the 2024 rules with the proposed version, explaining  
8 what changed and why.

9 This is a complete update, not a minor revision, and it is designed to strengthen ADA governance through  
10 transparency, consistency, and fairness. This resolution replaces the current ADA Election and Campaign  
11 Rules with a unified, modernized framework designed to promote fairness, expand access, and ensure  
12 compliance with nonprofit governance principles. It empowers all candidates equally, regardless of  
13 announcement timing, wealth, or connections, and protects the ADA’s integrity as a national professional  
14 association.

15 The American Dental Association (ADA), as a 501(c)(6) member-governed nonprofit, has an ethical  
16 obligation to conduct its elections in a manner that is fair and neutral.

17 Although the 2024 revision of the Election Commission and Campaign Rules aimed to improve clarity and  
18 structure, it left critical structural disparities unresolved. This resolution is a necessary continuation of that  
19 reform process, designed to align ADA’s internal election procedures with nonprofit governance norms  
20 and ethical standards.

21 One of the most damaging inequities is found in Rule 6, which creates a campaign hierarchy based  
22 entirely on the timing of a candidate’s announcement. Candidates who declare during the House of  
23 Delegates session are allowed full access to campaign opportunities, while those who declare later are  
24 barred from engaging with delegates outside their trustee districts. This rule favors incumbents and  
25 insiders and undermines the IRS expectation that internal elections provide equal access to participation.

26 Rule 8 compounds this imbalance by allowing any single candidate to veto campaign forums, interviews,  
27 or public appearances simply by declining to participate. This gives individual candidates the ability to  
28 silence others and prevents delegates from hearing all perspectives, a serious breach of member rights  
29 and a misuse of institutional neutrality. In a climate where many associations are facing scrutiny over  
30 internal bias, this kind of structural veto power poses reputational and legal risks.

1 The Campaign Rules also fail to address the growing problem of unregulated campaign spending.  
2 Candidates have spent six-figure amounts on their campaigns, with no reporting or limits, creating serious  
3 financial barriers to participation. Meanwhile, Rules 16 through 18 restrict affordable and modern  
4 communication tools, such as social media and third-party endorsements, further entrenching inequality.  
5 This framework discourages participation by qualified, lower-resourced members and undermines the  
6 integrity of ADA elections.

7 In recent years, candidates for President-elect have reported campaign expenditures exceeding  
8 \$150,000. This raises serious concerns about fiscal responsibility and fairness, especially given that the  
9 office (while respected and highly visible) does not carry broad governing authority within the ADA  
10 structure. The rising cost of campaigns risks creating an uneven playing field, where access to financial  
11 resources (rather than leadership ability, qualifications, or vision) becomes a determining factor in who  
12 can realistically run for office.

13 This trend also conflicts with the ADA's goals of efficiency, innovation, and inclusion. If the purpose of a  
14 campaign is to communicate a candidate's ideas and vision to members and delegates nationwide, that  
15 can be achieved more effectively, more affordably, and with wider reach by using ADA-supported digital  
16 platforms. Virtual forums, recorded video messages, and secure online engagement allow all candidates  
17 to be heard, regardless of their campaign budget. Continuing to rely on costly travel, in-person visits, and  
18 selectively controlled invitations limits exposure for both the candidates and the members they seek to  
19 serve. A modern, digital-first approach can increase transparency, reduce spending, and bring ADA  
20 elections in line with current expectations of access and equity.

21 These concerns are not theoretical. Multiple candidates have faced limitations under these rules, and  
22 ADA members across the Tripartite have raised ongoing concerns about fairness and access. ADA's  
23 *Common Ground 2025: ADA Strategic Plan (April 2021)* explicitly identifies "Commitment to Members,"  
24 "Diversity," and "Inclusion" as core organizational values. The *Principles of Ethics and Code of*  
25 *Professional Conduct (as revised to October 2024)* reinforces the ethical duty of fairness under the  
26 principle of Justice and requires governance processes that promote equity and transparency.

27 In addition to addressing legal and ethical risks, this resolution simplifies and standardizes the ADA's  
28 campaign rules to apply uniformly across all elective offices governed by the House of Delegates. A clear,  
29 consistent framework ensures that all candidates understand the expectations, reduces administrative  
30 confusion, and minimizes the risk of inconsistent enforcement. Uniform rules promote transparency and  
31 member trust while streamlining the campaign process across all levels of ADA leadership.

32 These reforms are not designed to benefit any specific candidate or faction. They are intended to ensure  
33 that all ADA members (regardless of timing, resources, or region) can participate in a process that reflects  
34 the highest standards of nonprofit governance and ethical fairness.

35 The proposed amendments modernize ADA election procedures, expand equitable access to candidates,  
36 encourage fiscal responsibility, and preserve ADA's credibility as a member-driven, tax-exempt  
37 professional association.

38 While this proposal expands access to modern communication tools, it does not open the door to  
39 unlimited spending or unchecked campaigning. Clear contribution caps, required financial disclosures,  
40 content moderation, and platform transparency are built into the proposed rules to ensure fairness,  
41 regardless of a candidate's resources or name recognition.

## 42 **Resolution**

43 **508. Resolved**, that the Election Commission and Campaign Rules as set forth in the *Manual of the*  
44 *House of Delegates* be deleted in its entirety, and be it further

1 **Resolved**, that Chapter VI. ELECTIVE OFFICERS OF THE ASSOCIATION, of the *Governance and*  
2 *Organizational Manual of the American Dental Association* be amended by addition of a new Section  
3 G. as follows:

4 # # #

5 G. Election Commission and Campaign Rules. The following Campaign Rules govern the  
6 announcement and conduct of campaigns for ADA elective officers. These Campaign Rules will  
7 be distributed annually to all candidates, delegates, alternate delegates and other parties of  
8 interest. Candidates for elective officers are expected to abide by the Campaign Rules. These  
9 Campaign Rules shall also apply to any individual who has not yet formally declared candidacy  
10 but has taken substantive steps indicating an intent to run for elective office, including but not  
11 limited to campaign planning, fundraising, or public discussion of their potential candidacy. Such  
12 individuals shall be bound by the same ethical, financial, and procedural standards outlined in  
13 this document.

14 **Procedures Concerning Interpretation and Distribution of the Campaign Rules**

15 1. To the extent one or more candidates has a question concerning the interpretation of the  
16 Campaign Rules or whether a particular activity is prohibited or permitted under the  
17 Campaign Rules, the following procedures shall be followed:

18  
19 a. Any declared candidate or campaign representative may submit a question directly to  
20 the Election Commission without the need for prior discussion with other candidates.

21 b. Any communications from a candidate to the Election Commission regarding these  
22 Campaign Rules shall be submitted to the chair of the Election Commission via email  
23 addressed to [electioncommission@ada.org](mailto:electioncommission@ada.org) or by such other means as the Election  
24 Commission may from time-to-time specify. All declared candidates will receive a copy of  
25 all communications. Such copies shall be provided within three (3) business days of receipt  
26 by the Chair.

27 c. Other candidates may provide their input within three (3) business days. The Election  
28 Commission shall issue a written **opinion** within five (5) business days of the close of the  
29 candidate input period and provide it to all declared candidates. All opinions shall be  
30 posted in the House of Delegates Library on ADA Connect. **Opinions shall not disqualify**  
31 **any candidate from continued campaigning or appearing on the ballot. Final**  
32 **authority regarding any consequences rests with the House of Delegates.**

33 2. Each year, a copy of the current Campaign Rules shall be distributed, signed and  
34 acknowledged by all ADA trustees and elective officers with the agenda and  
35 organizational material provided at the first meeting of the Board of Trustees following  
36 adjournment of the House of Delegates. It is the responsibility of each candidate to inform  
37 their campaign committee members, the constituent Executive Directors within their  
38 trustee districts and other constituent staff within their trustee districts who are assisting  
39 the campaign of these Campaign Rules within fourteen (14) days of the candidate's  
40 formation of a campaign committee or announcement of candidacy, whichever first  
41 occurs.

42 The current Campaign Rules shall also be made available to all members via ADA  
43 Connect and [www.ada.org](http://www.ada.org) to support transparency.

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### **Agreements Between Candidates**

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3. Candidates may engage in good-faith coordination regarding campaign schedules, shared forums, and travel logistics, provided that such agreements do not restrict access to campaign activities, reduce public communications, or create private advantages unavailable to other candidates. Agreements that would narrow or waive campaign rights outlined in these Rules shall be nonbinding and unenforceable. All candidates are encouraged to disclose any formal coordination to the Election Commission to preserve procedural fairness.

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The Election Commission shall not facilitate or enforce private agreements among candidates and reserves the right to disregard agreements that impair the fairness, transparency, or neutrality of the election process.

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### **Announcing Candidacy**

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4. Candidates for any elected position may formally announce their intent to run for office on the final day of the annual session immediately preceding their candidacy, or any time after. A formal announcement shall include, at a minimum, the name of the candidate and an identification of the office being sought. Prior to this formal announcement, candidates may freely campaign within their own trustee districts. Campaign activities outside a candidate's own trustee district shall begin only after the official announcement. Once declared to the Election Commission in writing, candidates are permitted to campaign without geographic restrictions. All nominating speeches shall be posted on ADA.org.

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5. Announcements of candidacies for the offices of Treasurer and Speaker of the House of Delegates shall follow the procedures outlined in Chapter VI, Sections B.2. and B.3. of the Governance Manual. These candidates shall also be subject to the same transparency and disclosure requirements as other declared candidates under these rules.

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### **Travel and Meeting Attendance**

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6. Candidates shall limit their campaign travel to attending state and/or district annual meetings and/or leadership conferences and annual session district caucus meetings to which all candidates ,for the same office, have been invited.

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Candidates may also accept invitations from other recognized ADA-affiliated or professional organizations, provided that such invitations are extended to all declared candidates for the same office.

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a. Candidates may attend such events if all declared candidates are given equal opportunity to participate. Coordination among campaigns is encouraged but not required for acceptance.

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b. Invitations for campaign appearances shall be sent directly and simultaneously to all declared candidates of the same office and their campaign managers, with a copy provided to the Office of the Executive Director for coordination and recordkeeping.

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c. Candidates are encouraged to coordinate their schedules in good faith and respond directly to the inviting organizations. In the event that a candidate is unable to attend a district or caucus event due to a religious holiday, scheduling conflict, or last-minute emergency, they shall have the option to participate virtually through audio or

1           audiovisual means, or to submit pre-recorded remarks. The format and duration of such  
2 participation shall be comparable to what is provided to other candidates, as  
3 determined by the host organization. The remaining candidates may proceed with the  
4 event as planned.  
5

- 6           7. To encourage fiscal responsibility, all candidates may use virtual audio or audiovisual  
7 means to campaign and answer questions at any time to any extent after their candidacy  
8 announcement. Virtual campaign appearances, interviews, or forums by all candidates  
9 may also be hosted by any organization, provided all declared candidates for the office in  
10 question are given equal notice and opportunity to participate. Invitations for virtual  
11 campaign appearances shall be sent directly to all declared candidates of the same office  
12 and their campaign managers, with a copy provided to the Office of the Executive Director  
13 for coordination and recordkeeping. Candidates may respond directly to invitations for  
14 virtual events. Coordination is encouraged but shall not be required. After a virtual  
15 candidate forum that is intended for all candidates, has been accepted by a candidate, if a  
16 situation arises that requires the candidate to cancel their attendance, the remaining  
17 candidates may participate as planned. Any candidate is free to decline any invitation and  
18 may submit a pre-recorded message with permission from the host. Hosts are  
19 encouraged to accept pre-recorded messages when a candidate cannot attend live, as  
20 long as the same option is offered to all candidates.
- 21           8. Caucuses and state meetings are requested to provide an appropriate opportunity for the  
22 candidates to meet with their members. It is recommended that such forums be structured  
23 to allow:  
24           a. All candidates to make presentations;  
25           b. Caucuses freedom to assess candidates; and  
26           c. Each candidate to respond to questions.
- 27           9. Notwithstanding any of these Campaign Rules, nothing in these Rules shall prevent a  
28 candidate from traveling on a personal basis or attending a meeting, conference or other  
29 event as an official ADA representative. Campaigning while personally traveling or  
30 attending events as an ADA representative is strictly prohibited. When traveling personally  
31 or as an ADA representative, candidates shall notify other candidates of such travel as  
32 soon as possible once the travel has been scheduled.
- 33           10. Candidates shall not use campaign-sponsored social functions or hospitality suite/meeting  
34 rooms on behalf of their candidacy at any regional, national or annual meeting. (This is not  
35 intended, however, to limit candidates from holding campaign meetings for the purpose of  
36 strategizing.) Campaign receptions are not to be held at the ADA Annual Session.  
37 Additionally, a district that hosts a reception during the ADA annual session and is  
38 sponsoring a candidate in a contested election shall not host the reception prior to the  
39 officer elections; a reception may be held after the election. Prior to the election,  
40 candidates shall not attend events in or visit district hospitality suites. This prohibition shall  
41 not apply to a candidate visiting his or her own district's hospitality suite or attending  
42 events hosted by their own district exclusively for the district's members. Districts and  
43 caucuses are encouraged to fully utilize virtual appearances before the Annual Session to  
44 allow delegates to ask questions and get to know the candidates. All declared candidates  
45 in each race should be invited to participate. This approach promotes equal access while  
46 helping limit costs and support fiscal responsibility.

- 1 11. Candidates may participate in news articles or interviews published in print or online  
2 journals provided that equal opportunity is extended to all candidates upon request. Hosts  
3 are encouraged to document in writing that all declared candidates were offered the same  
4 opportunity; candidates shall retain that documentation for review by ADA staff if questions  
5 arise.  
6
- 7 12. Candidates shall disclose their candidacy to any organizations or groups to which they  
8 belong and may request such groups not campaign on their behalf unless equal access is  
9 provided to all other candidates for that office.  
10
- 11 13. Candidates may participate in interviews and publications provided the subject matter is  
12 relevant to their professional expertise and not used for campaign messaging. National  
13 appearances, publications, or speaker engagements must not include endorsements or  
14 campaign solicitations. Campaign-related media must be disclosed to the Election  
15 Commission and other candidates when scheduled, and equal access must be offered to  
16 others upon request.

### 17 Use of Social Media

- 18 14. Candidates may use campaign-specific social media pages, podcasts, or online platforms  
19 to communicate with delegates and alternate delegates, provided access is offered  
20 equitably to all declared candidates and campaign-related content complies with the ADA  
21 Code of Ethics and these Rules. This approach promotes equal access and expanded  
22 exposure while helping limit costs and support fiscal responsibility.
- 23 a. Candidates shall notify the Election Commission of the digital platforms they intend  
24 to use for campaign communications and agree to maintain basic content  
25 moderation to ensure compliance with ADA rules.
- 26 b. Candidates may invite certified delegates, alternate delegates, campaign staff, and  
27 ADA observers to their campaign platforms.
- 28 c. Within 14 days of candidate declaration, the ADA shall provide candidates with a  
29 current delegate and alternate delegate list. Candidates may use this list to  
30 distribute digital invitations to their campaign platforms.
- 31 d. A second invitation may be sent using the most current official delegate list  
32 available from ADA staff, no later than 21 days prior to the House of Delegates  
33 session. If a more updated list becomes available within that period, campaigns are  
34 encouraged to send it again.
- 35 e. Candidates are responsible for ensuring that campaign-related content is accurate,  
36 relevant, and not defamatory. Campaign platforms must designate a moderator and  
37 comply with ADA Code of Ethics provisions on fairness and veracity.
- 38 f. Candidates shall not conduct surveys, polls, or vote-solicitation campaigns through  
39 their campaign platforms unless such tools are offered identically to all candidates  
40 by ADA.
- 41 g. Interactions on declared digital campaign platforms shall not count toward contact  
42 limits, but must remain public and viewable to all members of that platform.

1 h. Candidates may participate in interviews, podcasts, livestreams, forums, or digital  
2 communications hosted by independent platforms not affiliated with the ADA,  
3 including professional publications, podcasts, Facebook groups, or dental  
4 community pages. Participation in such media shall not require the consent of other  
5 candidates. A candidate's refusal to participate shall not prohibit others from  
6 accepting the same invitation. Prior to publication or broadcast, the host or  
7 moderator of any independent media appearance must send a written confirmation  
8 (such as an email) to the Office of the Executive Director, affirming that the  
9 opportunity to participate was extended to all declared candidates for the  
10 applicable race. All content must comply with the ADA Code of Ethics, including  
11 the principles of fairness and veracity.

12 15. The Election Commission shall not restrict participation in independent platforms,  
13 provided ADA rules and candidate ethics are upheld.

14 16. Candidates may use personal social media accounts for campaign-related posts,  
15 provided those posts follow all applicable campaign rules. Candidates are responsible for  
16 the content they post and are encouraged to monitor comments and tags that may violate  
17 ADA campaign policies. Campaign messages shared on personal pages should be  
18 publicly visible and accessible to all delegates.

19 **Campaign Literature and Communications to Delegates and Alternate Delegates**

20 17. No printed campaign-related material may be distributed in the House of Delegates or to  
21 delegates and alternate delegates.

22  
23 18. Candidates may prepare a piece of campaign literature to be electronically distributed to  
24 the delegates and alternate delegates following a candidate's announcement of  
25 candidacy for elective officer. Such campaign literature shall be sized so that if printed the  
26 literature is no larger than four single-sided sheets of 8½ x 11 inch paper. If desired, a  
27 second piece of campaign literature or similar length may be electronically distributed to  
28 the delegates and alternate delegates following the candidates' receipt from the ADA of  
29 the final list of certified delegates and alternate delegates.

30 19. Each candidate may prepare a video to be distributed as described below to delegates  
31 and alternate delegates and other members of the House of Delegates.

32 20. Candidate brochures, videos or other campaign-related communications can include  
33 photographs and likenesses of the candidate but shall not include any photograph,  
34 likeness or mention of any other current officer of the ADA or current member of the ADA  
35 Board of Trustees.

36 21. Each candidate shall submit campaign literature and video to the ADA's election  
37 commission for review to ensure compliance with accessibility and formatting standards.  
38 The election commission may provide recommendations or flag concerns but will not  
39 require formal approval prior to distribution. The candidates shall obtain permissions to  
40 use the likeness or image of any non-familial third party that appears in a piece of  
41 campaign literature or in any video. Candidates shall state that such permissions have  
42 been obtained when submitting the literature and any video for review. The permission  
43 should be retained by the candidates and submitted to the ADA only if requested.

- 1           22. Each candidate is permitted to individually communicate with each delegate and alternate  
2           delegate three times via an electronic communication (i.e., email) for the purpose of  
3           campaigning, electioneering and soliciting votes following the receipt from the ADA of the  
4           list of certified delegate and alternate delegate contact information. A third party vendor  
5           may be used to send such electronic communications so long as the privacy of the email  
6           addresses and identities of the recipients are maintained and preserved and there is no  
7           ability to reply to all the recipients of the electronic communication. At each candidate's  
8           option, the candidate's electronic communication may contain the campaign literature  
9           and/or video referenced in these Campaign Rules, either by embedding or attaching the  
10          literature and/or the video to the electronic communication or by providing a hyperlink or  
11          hyperlinks that connect to the literature and/or the video that is stored in a remote location  
12          maintained by or on behalf of the candidate.
- 13          23. Each campaign is permitted to individually initiate a telephonic (phone call or text)  
14          communication with each delegate and alternate delegate three times for the purpose of  
15          campaigning, electioneering and soliciting votes following the receipt from the ADA of the  
16          list of certified delegate and alternate delegate contact information.
- 17          24. Nothing in these Campaign Rules shall prevent a candidate from communicating  
18          regarding matters within the specific duties of the candidate's position as an ADA officer,  
19          member of the Board of Trustees, task force or work group, as long as the  
20          communication is strictly related to such responsibilities and is not used for campaigning,  
21          electioneering or soliciting votes.
- 22          25. Candidates may each schedule up to three (3) telephone or video conferencing forums or  
23          town hall events during the campaign. A candidate desiring to hold up to three (3)  
24          telephone or video conferencing forums or town hall events shall communicate to the  
25          ADA the date of each event and the times at which each such event shall commence and  
26          end, together with the instructions and contact information necessary for participants to  
27          email and/or call with the questions they would like asked during the telephonic town hall.  
28          The ADA will announce the telephone or video conferencing town hall information to  
29          delegates and alternate delegates via ADA Connect and provide the information to the  
30          Election Commission members and staff. Candidates may also publicize the telephonic  
31          town halls they sponsor on any media.
- 32          26. The agenda for a candidate's telephonic town hall meeting(s) shall be the prerogative of  
33          the candidate, with the candidates being permitted to provide opening and closing  
34          statements and whether follow-up questions are permitted. The length of the telephonic  
35          town hall event is also discretionary with the candidate.
- 36          27. Candidates are expected to maintain a respectful tone during town halls and may use a  
37          moderator to manage questions and content. Offensive or defamatory comments are  
38          discouraged, but candidates shall not be held responsible for unscripted audience  
39          remarks beyond their control.

40

### **Contributions**

- 41          28. Contributions (including money and in-kind services) may only be accepted from  
42          individual dentists, family members, and ADA constituent or component dental societies  
43          (including study clubs and branches recognized by a constituent society). Contributions  
44          from any other source are not permissible. No candidate shall knowingly accept any  
45          contribution that creates the appearance of a conflict of interest as defined in the ADA

1 Bylaws. Total contributions from any individual donor (including family members, friends,  
2 or colleagues) shall not exceed \$2,500 per election cycle. Total contributions from any  
3 ADA constituent or component society shall not exceed \$10,000 per candidate. All  
4 contributions over \$500, including self-funding and in-kind support, must be disclosed to  
5 the Election Commission within 10 business days of receipt. Because contributions from  
6 constituent and component societies may come from membership dues, all such support  
7 must be transparently reported and made accessible to ADA members through  
8 appropriate posting on ADA Connect and the candidate's campaign website, if applicable.

9 29. The sending of a brief note acknowledging a financial contribution or thanking a host of a  
10 campaign event to those contributors or hosts outside of the candidate's district is  
11 permitted, as long as no additional campaign message is included. Such thank you notes  
12 may be sent on campaign letterhead or a notecard containing the campaign logo;  
13 envelopes for the thank you note may contain an identification of the campaign or the  
14 campaign logo.

15 30. Any contribution source that could be interpreted to be a conflict of interest or creates the  
16 appearance of a conflict of interest must be reported to the Election Commission and the  
17 ADA Board of Trustees. In the event a contribution source is deemed to be a conflict of  
18 interest or creates the appearance of a conflict of interest, the candidates will be required  
19 to return the contribution.

20 31. Candidates for all ADA elective offices shall submit a monthly detailed report of all  
21 campaign contributions and expenses to the Election Commission by the 15<sup>th</sup> of the  
22 following month. The report shall include all contributions (regardless of amount), in-kind  
23 services, and expenditures. Campaigns shall also provide a summary of total funds  
24 raised and spent by the first of each month during the campaign period. These monthly  
25 summaries shall be posted by the Election Commission in the House of Delegates Library  
26 on ADA Connect for ADA member access.

### 27 **Violations**

28 32. In the event a violation of the Campaign Rules is determined by the Election Commission  
29 to have occurred more than fourteen (14) days prior to the House of Delegates  
30 convening, then the Election Commission, if it cannot resolve the violation between the  
31 candidates, shall post a report of the violation in the House of Delegates section on ADA  
32 Connect. In addition, an email reporting on any such violations will be sent by the Election  
33 Commission to each certified delegates and alternate delegates with a working email  
34 address on file with the ADA on or about fourteen (14) days prior to the convening of the  
35 House of Delegates. Prior to public reporting of any violation, the Election Commission  
36 shall notify the candidate in writing and allow a reasonable opportunity to respond. Any  
37 candidate named in a public violation report shall be given the opportunity to submit a  
38 written or oral response, which shall be made available to the House of Delegates  
39 alongside the original report.

40 33. In the event a violation of the Campaign Rules is determined by the Election Commission  
41 to have occurred in the period from fourteen (14) days prior to the convening of the  
42 House of Delegates through the elections of elective officers, then the Election  
43 Commission, if it cannot resolve the violation between the candidates, shall report those  
44 violations to the House of Delegates. The report will be given orally by the Election  
45 Commission chair (or a designee of the Election Commission if the chair is absent from  
46 the House of Delegates session) at the first meeting of the House. If violations occur after

1 that meeting, and before the election, then a report of such violations shall be read to  
2 each caucus by a designee of the Election Commission. The candidate shall also be  
3 offered an opportunity to respond orally or in writing prior to or during the same session in  
4 which the violation is reported.

5 34. Should an allegation of a Campaign Rules violation against an individual or entity not  
6 affiliated with a campaign be made, the Election Commission shall review the allegation  
7 and determine if a violation has occurred. If so, the campaign and candidate affected by  
8 the infraction will be notified, and shall be responsible for contacting the individual or  
9 entity involved and using their best efforts to curtail the violation.

10 35. In addition to the foregoing notifications of violations, all violations of the Campaign Rules  
11 that occur shall be reported orally at the House of Delegates meeting by the Election  
12 Commission. The ADA encourages all delegates to review reported violations and  
13 candidate responses when casting votes, as ethical campaign conduct reflects integrity in  
14 leadership.

15 and be it further

16 **Resolved**, that the *Governance and Organizational Manual*, Chapter VI. ELECTIVE OFFICERS OF  
17 THE ASSOCIATION, Sections B.2. and B.3., be amended as follows (additions underscored,  
18 deletions ~~stricken through~~):

19 B. Nominations

20 \* \* \*

21 2. Treasurer. The search for Treasurer shall be announced in an official publication of the  
22 Association in November of the final year of the incumbent Treasurer's term, together with the  
23 recommended qualifications for that position as provided in the *Bylaws*. Candidates for the  
24 office of Treasurer shall apply by submitting a standardized Treasurer *Curriculum Vitae* form to  
25 the Executive Director at least one hundred twenty (120) days prior to the convening of the  
26 House of Delegates. Each candidate's application shall be reviewed by the Board of Trustees.  
27 At least sixty (60) days prior to the convening of the House of Delegates the Executive Director  
28 shall provide all members of the House of Delegates, with each candidate's standardized  
29 Treasurer *Curriculum Vitae* and the determination of the Board of Trustees as to whether the  
30 candidate meets the recommended qualifications for the office of Treasurer. No other  
31 candidate shall be nominated from the floor of the House of Delegates. Nominations shall be  
32 made in accordance with the order of business. ~~Each nomination may be followed by an~~  
33 ~~acceptance speech not to exceed four (4) minutes by the candidate from the podium,~~  
34 ~~according to the protocol established by the Speaker of the House of Delegates. Seconding a~~  
35 ~~nomination is not permitted.~~ No further nominations for the office of Treasurer shall be  
36 accepted from the floor of the House of Delegates. If there are no eligible candidates for the  
37 office of Treasurer when the House of Delegates meets, the term of the incumbent Treasurer  
38 shall be extended by one (1) year. Should the incumbent Treasurer be unwilling or unable to  
39 serve an additional one (1) year term, the office of Treasurer shall be filled in accordance with  
40 the vacancy provisions of this chapter of the *Governance Manual*. Under these circumstances,  
41 former Treasurers of this Association not otherwise eligible to serve as Treasurer due to term  
42 limits will be eligible to serve as Treasurer until the House of Delegates can elect a Treasurer.

43  
44 3. Speaker of the House of Delegates. The search for Speaker of the House shall be announced  
45 in an official publication of the Association in November of the final year of the incumbent  
46 Speaker of the House's term. Candidates for the office of Speaker of the House shall apply  
47 by submitting a curriculum vitae along with a statement supporting their qualifications to the

1 Executive Director at least one hundred twenty (120) days prior to the convening of the  
2 House of Delegates. At least sixty (60) days prior to the convening of the House of Delegates  
3 the Executive Director shall provide all members of the House of Delegates with each  
4 candidate's Curriculum Vitae and statement of qualifications for the office of Speaker of the  
5 House. If no candidate has applied and submitted the required documentation, then the  
6 Association shall inform all delegates of this circumstance and the period to apply shall be  
7 extended to thirty (30) days prior to the convening of the House of Delegates. Only  
8 candidates who have applied and submitted the required documentation shall be nominated  
9 from the floor of the House of Delegates. If thirty (30) days prior to the convening of the  
10 House of Delegates no candidate has applied and submitted the required documentation  
11 then the Association shall inform all delegates of this circumstance and also inform them that  
12 nominations shall be permitted from the floor of the House of Delegates. Nominations for the  
13 office of Speaker of the House shall be made in accordance with the order of business. ~~Each~~  
14 ~~nomination may be followed by an acceptance speech not to exceed four (4) minutes by the~~  
15 ~~candidate from the podium, according to the protocol established by the Speaker of the House~~  
16 ~~of Delegates. Seconding a nomination is not permitted.~~ If there are no candidates for the  
17 office of Speaker of the House nominated when the House of Delegates meets, the term of  
18 the incumbent Speaker of the House shall be extended by one (1) year. Should the  
19 incumbent Speaker of the House be unwilling or unable to serve an additional one (1) year  
20 term, the office of Speaker of the House shall be filled in accordance with the vacancy  
21 provisions of this chapter of the Governance Manual. Under these circumstances, former  
22 Speakers of the House not otherwise eligible to serve as Speaker due to term limits will be  
23 eligible to serve as Speaker until the House of Delegates can elect a Speaker of the House.

24 **BOARD COMMENT:** The Board of Trustees thanks the maker of Resolution 508 for its submission but  
25 cannot support the resolution because it is deficient in a number of respects. For example, the resolution  
26 seeks to rescind the current Election Commission and Campaign Rules in their entirety, including the first  
27 paragraph of the Election Commission and Campaign Rules that sets the composition of the Election  
28 Commission (see, 2025 Manual of the House of Delegates and Supplemental Information, page 65, 1st  
29 paragraph). Resolution 508 does not indicate the make-up of the revised Election Commission.  
30

31 In addition, the 2024 House of Delegates adopted 518H-2024, directing a comprehensive review of the  
32 Election Commission and the Campaign Rules for Elective Office to be conducted by a task force made  
33 up of a balanced set of constituencies, and requesting a report back to the 2025 House of Delegates on  
34 that review.\* A task force was formed and has completed its work, culminating in Resolution 515. The  
35 Board of Trustees unanimously recommends implementing the revisions proposed by the task force in  
36 Resolution 515 and therefore does not support the adoption of 508.

37 \* Resolution 518H-2024 specified that the task force be composed of a member of each of the following  
38 groups: new dentists, recent (within the past three years) candidates for elective office, recent (within the  
39 past three years) campaign managers for candidates for elective office, trustee district caucuses and the  
40 House of Delegates. The current chair of the Election Commission chaired the task force.

1 **BOARD RECOMMENDATION: Vote No.**

2 **Vote: Resolution 508**

BERG	No	DOWD	No	KNAPP	No	STUEFEN	No
BOYLE	No	GRAHAM	No	MANN	No	TULAK-GORECKI	No
BROWN	No	HISEL	Absent	MARKARIAN	No	WANAMAKER	No
CAMMARATA	No	HOWARD	No	MERCER	No		
CHOPRA	No	IRANI	No	REAVIS	No		
DEL VALLE-SEPÚLVEDA	No	KAHL	No	ROSATO	No		

**Appendix A - Comprehensive Comparison:**

**1 2024 Rules vs. Proposed Modernized Rules**

2 The 2024 campaign rules were a step toward improving fairness, but they preserved several outdated  
 3 structures that unintentionally limit access, favor insiders, and expose the ADA to reputational and legal  
 4 risk. The proposed Version modernizes the entire campaign framework to align with nonprofit governance  
 5 principles, including procedural fairness, transparency, and equal access as outlined by the IRS in  
 6 Publication 557. These changes do not favor any candidate or ideology. They ensure that *any qualified*  
 7 *member*, regardless of timing, wealth, or insider status, can run for office in a process that is consistent,  
 8 equitable, and ethical. It also promotes fiscal responsibility, supports digital engagement, and protects the  
 9 ADA’s standing as a tax-exempt professional association committed to integrity and inclusion.

Rule/Topic	2024 Campaign Rules	Proposed Modernized Rules	Change Summary
<b>1. Campaign Start (Rule 6)</b>	Only candidates who announce on the last day of the Annual Session may campaign nationally. Others are restricted to their own trustee district.	Any candidate may declare their candidacy in writing at any time and begin campaigning across the country.	Removes insider privilege. Opens the field to all candidates, regardless of timing.
<b>2. Veto Power Over Appearances (Rule 8)</b>	Candidates must agree unanimously to attend joint events. A single candidate can block everyone else from attending by refusing.	No single candidate can block others. Each candidate may attend, submit a video, or participate virtually regardless of others’ choices.	Ends structural silencing. Promotes free speech and equal access to delegates.
<b>3. Digital Campaigning &amp; Social Media (Rules 16-18)</b>	Only a closed Facebook group is allowed. No other digital tools, no personal social media, no podcasts or livestreams.	Allows podcasts, livestreams, personal accounts, digital forums, and independent media, as long as content is ethical and access is fair.	Modernizes outreach. Removes outdated bans. Promotes inclusion and cost-effective messaging.
<b>4. Independent Media Engagement</b>	Participation in national or non-peer reviewed publications is discouraged or prohibited.	Allowed if the host offers equal access to all candidates and confirms this in writing.	Creates opportunity while ensuring fairness. Avoids favoritism.
<b>5. Personal Social Media Use</b>	Candidates must monitor and remove any campaign-related posts or third-party tags on personal pages.	Candidates may use personal social media for campaign posts, provided content is accessible and ethical. Monitoring for abuse still required.	Removes unnecessary restrictions while keeping the process respectful and fair.
<b>6. Digital Platform Expansion</b>	Only closed Facebook groups for delegates allowed, moderated under strict ADA policies.	Any ADA-compliant digital platform may be used. Campaigns must designate moderators and follow ADA Code of Ethics.	Increases flexibility. Encourages innovation. Maintains integrity through clear responsibility.

**Appendix A - Comprehensive Comparison:**

<b>Rule/Topic</b>	<b>2024 Campaign Rules</b>	<b>Proposed Modernized Rules</b>	<b>Change Summary</b>
<b>7. Equal Access for Literature/Video</b>	ADA must formally review and approve any campaign materials before distribution.	ADA may flag issues or suggest edits but cannot block distribution unless there's an ethics violation.	Shifts from censorship to transparency. Keeps campaign content candidate-driven.
<b>8. Email/Text Contact Limits</b>	One campaign email and one call/text per delegate allowed.	Three emails and three phone/text contacts per candidate are allowed.	Strengthens communication while preserving limits to avoid spam.
<b>9. Unannounced Candidates</b>	Rules apply only to officially declared candidates.	Rules also apply to individuals engaged in campaign activity (planning, fundraising, etc.) even if they haven't declared.	Closes ethical loophole. Ensures fairness across the board.
<b>10. Campaign Agreements Between Candidates</b>	Private agreements are allowed but not monitored.	Such agreements are non-binding if they restrict access, reduce fairness, or silence others.	Prevents private backroom deals from undermining public fairness.
<b>11. Appearance Invitations (Rule 8)</b>	All invitations must go through ADA staff, and campaigns must coordinate attendance by vote.	Invitations can go directly to candidates; coordination is encouraged but not required.	Removes gatekeeping. Allows candidates more flexibility to speak with constituents.
<b>12. Town Hall Forums</b>	Three virtual town halls are allowed, subject to ADA control.	Still allows three, but format is more flexible. Pre-recorded participation allowed. Independent hosts permitted.	Expands access, supports lower-cost campaigning, and encourages diverse formats.
<b>13. Contributions – Sources and Caps</b>	No formal caps. No required disclosures except for conflicts of interest.	\$2,500 limit per donor; \$10,000 per ADA society. All contributions over \$500 must be disclosed within 10 days.	Prevents excessive spending. Creates level playing field and transparency.
<b>14. Financial Reporting</b>	Summary report required at end of campaign.	Monthly detailed financial reports required, including in-kind donations.	Promotes fiscal accountability and fairness. Discourages hidden money.
<b>15. Violations and Due Process</b>	Election Commission may report violations; candidates may have limited ability to respond.	Commission must notify candidate first. Candidate has right to respond in writing or orally before the House.	Adds basic due process protections. Promotes fairness and credibility.

Resolution No. 509 New

Report: N/A Date Submitted: July 11, 2025

Submitted By: Dr. Steven Saxe, delegate, Nevada

Reference Committee: D (Legislative, Governance and Related Matters)

Total Net Financial Implication: None Net Dues Impact: \_\_\_\_\_

Amount One-time: \_\_\_\_\_ Amount On-going: \_\_\_\_\_

ADA Strategic Forecast Outcome: Tripartite: Align member value across the Tripartite.

1 **FULLY FUNDED ADA ADVOCACY REALIGNED WITH DENTIST PRIORITIES THROUGH STATE-**  
2 **FOCUSED INVESTMENT AND NATIONAL COLLABORATION**

3 The following resolution was submitted on Friday, July 11, 2025, by Dr. Steven Saxe, delegate, Nevada.

4 **Background:** Advocacy is consistently ranked by ADA members as the most influential benefit of  
5 membership, with lobbying on behalf of dentists cited as the top reason for renewing, [according to the](#)  
6 [Council on Membership's 2024 report](#). Given that early career dentists also rank advocacy and volunteer  
7 opportunities as key priorities, this strongly suggests that advocacy is not only critical to retention—but  
8 also serves as a powerful tool for recruiting non-members, especially younger practitioners who are  
9 evaluating whether the ADA reflects their professional interests

10 Yet, ADA's current federal advocacy efforts have consumed millions of dollars over the last decade while  
11 producing few wins. The repeal of the McCarran-Ferguson exemption cost years of lobbying investment  
12 and yielded no tangible benefit to practicing dentists. The push for licensure compacts was not broadly  
13 supported by member dentists or many state societies, but still moved forward. Meanwhile, the ADA's  
14 advocacy around dental loss ratio (DLR) bills has often failed to reflect the real interests of dentists,  
15 resulting in weak or counterproductive legislation. One major example is the NCOIL DLR model, which is  
16 now cited as a national template despite being toothless and detrimental to meaningful reform. The  
17 NCOIL model should not be referenced or endorsed by the ADA, as it lacks meaningful protections for  
18 dentists and undermines efforts to achieve substantive dental loss ratio reform.

19 Despite sustained investment of time, staff, and financial resources, ADA's federal advocacy efforts have  
20 yielded few tangible results in recent years. While the Association has consistently pushed high-priority  
21 legislation through coordinated lobbying, coalition efforts, and member mobilization, most major federal  
22 bills have stalled or failed to pass. These repeated outcomes suggest that federal advocacy, while well-  
23 intentioned, has produced limited return on investment—especially when compared to more nimble and  
24 successful efforts at the state level. The following examples highlight federal initiatives that consumed  
25 significant attention and resources without achieving legislative success:

- 26 • [REDI Act \(Resident Education Deferred Interest Act\)](#)  
27 • [Medicaid Dental Benefit Act of 2023](#)  
28 • [Ensuring Lasting Smiles Act \(ELSA, 117th Congress\)](#)  
29 • [SMILED Act \(Strengthening Medicaid Incentives for Licensees Enrolled in Dental Act, H.R. 1422\)](#)

30 This top-down approach has failed to reflect what most member dentists actually want. Instead of  
31 focusing on what dentists need in their own states, ADA federal efforts have prioritized large, expensive  
32 campaigns that are poorly aligned with real member pain points.

1 Dentists consistently rank insurance-related problems—such as low reimbursements, network leasing,  
2 virtual credit card fees, and lack of transparency—as their top practice concern. These issues affect  
3 patient care, professional autonomy, and office sustainability. Yet ADA’s national strategy has not treated  
4 insurance reform as a flagship advocacy priority. Dentists across the country want action, and they want it  
5 led from the ground up. Focusing our advocacy structure around supporting state-level insurance reform  
6 is not just good strategy—it’s necessary to remain relevant to the profession.

7 In contrast, impactful legislative wins have happened at the state level, driven by the dentists who live and  
8 work in those communities. The Illinois State Dental Society (ISDS), for example, secured legislation in  
9 2024 that:

- 10 • Banned mandatory use of virtual credit cards by insurers
- 11 • Required insurers to notify providers before leasing their contracts to third-party networks
- 12 • Protected early-career dentists from abusive non-compete agreements

13 These state-level changes are meaningful, measurable, and highly visible. They show dentists that  
14 advocacy can work—and when dentists see results, they are more likely to engage, support, and join.

15 However, the ADA’s current resource allocation still centers on federal activities: Washington offices,  
16 lobby day events, high-level consultant fees, and legislative campaigns that may or may not reflect  
17 adopted House policy. Redirecting a significant share of that spending toward state-specific support will  
18 both improve results and increase member satisfaction.

19 The ADA already provides State Public Affairs (SPA) grants to help fund state campaigns. However,  
20 these grants are not always distributed based on strategic alignment with mission or impact. Several  
21 states report inefficiencies in how SPA funds are used. A mission-based, outcome-driven model is  
22 overdue.

23 Additionally, dentistry suffers from fragmentation in advocacy efforts. The ADA, AGD, ADEA, AAOMS,  
24 and other specialty groups often lobby on overlapping issues without coordination. This duplication  
25 weakens dentistry’s influence and wastes limited resources. A unified coalition effort would increase our  
26 power, credibility, and results.

27 To lead effectively, the ADA must fully staff and fund its Government Affairs Division, expand support for  
28 states, and serve as a responsive, listening partner—not the driver of top-down campaigns. Every dollar  
29 invested in advocacy must be a dollar that helps members see results they can believe in.

30 Finally, because advocacy is the most important thing to current members and a top reason non-  
31 members say they would join, the ADA must not only preserve advocacy resources—it must grow them.  
32 Investing in impactful, publicized wins will help reverse our membership decline and show the next  
33 generation that the ADA is worth belonging to.

### 34 **Resolution**

35 **509. Resolved**, that the American Dental Association urges the Board of Trustees to protect and  
36 maintain all existing advocacy funding, including but not limited to the Government Affairs and State  
37 Public Affairs (SPA) budgets, contracted advocacy services, and staff positions directly supporting  
38 advocacy functions, and to increase such funding annually by at least the Consumer Price Index  
39 (CPI) or comparable inflationary measure, and to target an annual advocacy investment of at least  
40 \$25 million within five years of the adoption of this resolution, unless an extension is authorized by  
41 the House of Delegates through a resolution submitted by the Finance Committee, and be it further

42 **Resolved**, that the appropriate ADA agencies shall publish an annual advocacy performance report  
43 detailing state and federal policy outcomes, use of SPA funds, key member-facing wins (including  
44 but not limited to legislative or regulatory outcomes that directly benefit dentists or their patients), and

1 the Association’s progress toward its advocacy investment target, and that this report shall be made  
 2 publicly available to demonstrate the value of ADA advocacy to members and prospective members  
 3 alike, and be it further

4 **Resolved**, that the Board of Trustees be urged to fully fund the Government Affairs Division at levels  
 5 sufficient to support both federal and state initiatives, and redirect no less than 80% of the  
 6 Government Affairs budget including but not limited to staff, contracts, consultant services, travel,  
 7 lobby day expenditures, policy development, media campaigns, and research, toward supporting  
 8 state-led legislative efforts that address issues specific to each state’s needs and priorities, and shall  
 9 structure SPA grants and other state-level funding support based on strategic alignment with  
 10 mission-based legislative objectives, with documentation of planning, execution, and measurable  
 11 outcomes required as a condition of future disbursements, and be it further

12 **Resolved**, that the Board of Trustees be urged to prioritize insurance reform as a core component of  
 13 its advocacy strategy, and dedicate no less than 30% of its total advocacy budget annually to  
 14 supporting state and federal efforts that address insurance-related legislation, including but not  
 15 limited to network leasing abuses, third-party payment practices, lack of fee transparency, and  
 16 advancing meaningful dental loss ratio reform aligned with House of Delegates policy, as well as  
 17 other member-identified insurance concerns.

18 **BOARD COMMENT:** The Board is concerned with the financial and operational implications of this  
 19 resolution. As drafted, this resolution would negatively impact ADA’s budget by \$25 million or more within  
 20 60 months with no clear fiscal guidance on how these funds will be procured. Moreover, the restrictive  
 21 nature of the resolution inhibits the ADA’s ability to reasonably adapt and prioritize advocacy priorities and  
 22 limits the bulk of ADA’s advocacy work to supporting state activity. Further, the ADA presently reports its  
 23 advocacy activity through a variety of publications including, but not limited to, CGA Annual Reports, ADA  
 24 News Articles, social media, and other published materials, including ADA.org.  
 25 As such, the Board recommends a No vote on Resolution 509.

26 **BOARD RECOMMENDATION: Vote No.**

27 **Vote: Resolution 509**

BERG	No	DOWD	No	KNAPP	No	STUEFEN	No
BOYLE	No	GRAHAM	No	MANN	No	TULAK-GORECKI	No
BROWN	No	HISEL	Absent	MARKARIAN	No	WANAMAKER	No
CAMMARATA	No	HOWARD	No	MERCER	No		
CHOPRA	No	IRANI	No	REAVIS	Absent		
DEL VALLE-SEPÚLVEDA	No	KAHL	No	ROSATO	No		



1 **BOARD RECOMMENDATION: Vote No.**

2 **Vote: Resolution 511**

BERG	Yes	DOWD	No	KNAPP	No	STUEFEN	Yes
BOYLE	Yes	GRAHAM	No	MANN	No	TULAK-GORECKI	No
BROWN	No	HISEL	No	MARKARIAN	Absent	WANAMAKER	No
CAMMARATA	Yes	HOWARD	No	MERCER	Absent		
CHOPRA	No	IRANI	No	REAVIS	Absent		
DEL VALLE-SEPÚLVEDA	No	KAHL	No	ROSATO	No		



1 **Resolved**, that the ADA supports the concept of a “Medical Loss Ratio” for dental plans defined as  
2 the proportion of premium revenues that is spent on clinical services, specifically:

3 (A) The numerator is the sum of (1) the amount paid for clinical dental services provided to  
4 enrollees and (2) the amount paid to providers on activities that improve oral health through  
5 clinical services for plan enrollees.

(B) The denominator is the total amount of premium revenue, excluding only (1) federal and state  
taxes, (2) licensing and regulatory fees paid, and (3) any other payments required by federal  
law,

6 and be it further

7 **Resolved**, that states pursuing MLR, refer to the definitions of each of the amounts referenced in the  
8 numerator and denominator within the ADA’s Glossary of Dental Administrative Terms maintained by  
9 the ADA Council on Dental Benefit Programs (CDBP), and be it further

10 **Resolved**, that dental plans, both for profit and nonprofit should be required to make information  
11 available to the general public and to publicize in their marketing materials to plan purchasers and in  
12 written communications to their beneficiaries the percentage of premiums that fund treatment and  
13 the percentage of premiums that go to administrative costs, promotion, marketing and profit, or in the  
14 case of nonprofit entities, reserves, and be it further

15 **Resolved**, that the ADA support legislative efforts to require dental benefit plans to file a  
16 comprehensive MLR report annually, which contains the same information required in the 2013  
17 federal MLR Annual Report Form (CMS-10418) along with number of enrollees, the plan cost-  
18 sharing and deductible amounts, the annual maximum coverage limit and the number of enrollees  
19 who meet or exceed the annual coverage limit and to establish a specific loss ratio for dental plans in  
20 each state, and be it further

21 ~~**Resolved**, that a “specific loss ratio” be calculated by each state as the average dental loss ratio for  
22 each market segment (large group and small/individual groups as defined within the state). If the  
23 average loss ratio is less than 85% for large group plans and 83% for small/individual groups, then  
24 states should aspire to establish a mechanism to have MLR improved to at least this benchmark  
25 over time. For those carriers reporting MLR above 85%, such carriers should be required to maintain  
26 operations at that level, and be it further~~

27 **Resolved**, that the ADA shall adopt the following principles as negotiation framework for any future  
28 development, negotiation, endorsement, or support of model dental loss ratio legislation in  
29 collaboration with external organizations:

30 (A) Loss ratio benchmarks must apply to individual insured dental plans (not to market-wide  
31 averages), and implementation models such as “Rising Tide,” which apply only to statistical  
32 outliers or rely on multi-year rolling averages, shall be considered non-compliant with ADA policy.

33 (B) Loss ratio targets shall be set at a minimum of 85% for large group plans and 83% for small  
34 or individual plans, and insurers whose plans fail to meet these thresholds must issue rebates or  
35 premium credits to purchasers. Such rebates must be returned within a defined timeframe, with  
36 the return method (check or credit) clearly disclosed.

37 (C) Loss ratio calculations must exclude charitable contributions, broker commissions, and non-  
38 clinical quality improvement programs from any part of the numerator or denominator.

39 (D) Insurers must submit publicly accessible annual financial statements, broken down by line of  
40 business and plan, and itemized to show spending on direct patient care, administrative  
41 expenses, broker fees, charitable giving, and surplus.

1 (E) Insurers with excessive surplus (e.g., a risk-based capital ratio above 700%) must be  
 2 subject to public financial review and required to explain the need for the excessive surplus, or  
 3 how the excessive surplus will be reassigned to refund patients or benefit patients.

4 (F) Annual administrative cost increases must be limited to the percentage increase in the  
 5 dental services Consumer Price Index (CPI), and any rate filings that exceed this threshold may  
 6 be presumptively disapproved by state regulators, followed by hearings to justify the need for  
 7 increases above the dental services CPI.

8 (G) State regulatory agencies must retain full authority to disapprove rate filings that are  
 9 excessive, inadequate, discriminatory, or not actuarially justified, and shall do so within a clearly  
 10 defined public review timeline with a right to appeal.

11  
 12 (H) States should establish mechanisms to improve plan-level loss ratios to meet or exceed the  
 13 applicable 85% or 83% benchmarks over a defined period of time.

14 and be it further

15 **Resolved**, that the ADA shall develop and distribute model statutory language and implementation  
 16 guidance for use by state dental societies seeking to strengthen existing dental loss ratio laws or  
 17 correct previous legislative compromises that do not align with ADA policy as amended, and be it  
 18 further

19 **Resolved**, that when a carrier fails to meet the MLR, the carrier be required to issue rebates to plan  
 20 purchasers, and be it further

21 **Resolved**, that instituting an MLR should not result in premium rate increases in excess of the  
 22 percentage increase of the latest dental services Consumer Price Index as reported through the US  
 23 Bureau of Labor Statistics.

24 **BOARD COMMENT:** The Board appreciates the maker’s intention; however, the proposals contained in  
 25 Resolution 517 are too prescriptive and may unfairly burden constituent societies that choose the  
 26 adoption of different metrics when determining dental loss ratio.

27 The Board recommends referral back to the Council on Dental Benefit Programs.

28 **BOARD RECOMMENDATION: Vote Yes on Referral.**

29 **Vote: Resolution 517**

BERG	Yes	DOWD	Yes	KNAPP	Yes	STUEFEN	Yes
BOYLE	Yes	GRAHAM	Yes	MANN	Yes	TULAK-GORECKI	Yes
BROWN	Yes	HISEL	Yes	MARKARIAN	Absent	WANAMAKER	Yes
CAMMARATA	Yes	HOWARD	Yes	MERCER	Absent		
CHOPRA	Yes	IRANI	Yes	REAVIS	Absent		
DEL VALLE-SEPÚLVEDA	Yes	KAHL	Absent	ROSATO	Yes		



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**Resolution**

**519. Resolved**, that the Standing Rules of the House of Delegates, section titled “Items of Business” in the *Manual of the House of Delegates* be amended as follows (additions underlined, deletions ~~stricken through~~):

*Items of Business*

An item of business becomes the property of the House of Delegates and is subject to House action in accordance with the appropriate order of business and agenda schedule when such item is received in writing by the American Dental Association Executive Director (Secretary of the House) subject to the following conditions:

1. Reports and resolutions from Association agencies, constituent and component societies, trustee districts, individual delegates, and any three members in good standing are governed by the Association *Bylaws* and the *Manual of the House of Delegates*. The three members in good standing submitting a resolution shall have the option to request formatting support from their state or constituent leadership, local district caucuses, and the American Dental Association, who may not block, delay, or alter the substance of the resolution but may assist the members in bringing the resolution into proper order.
2. Resolutions from dental agencies not part of the American Dental Association may become items of business at the discretion of the House if received in writing by the Executive Director (Secretary of the House) at least 15 days in advance of a session.

**BOARD COMMENT:** The Board of Trustees deeply values the ingenuity, initiative, and commitment of individual members who seek to contribute to the work of the American Dental Association. The strength of our Association lies in the diversity of voices and the dedication of members who identify opportunities to improve our profession and patient care.

At the same time, when an issue rises to the House of Delegates, it becomes a matter of formal policy development that shapes the future of our organization. Such matters deserve the benefit of thorough preparation, meaningful dialogue, and the fiduciary oversight that ensures the House can consider policy proposals with the seriousness and diligence they require.

This amendment preserves the important role of individual members in surfacing ideas while reinforcing the responsibility of constituent, component, and trustee leadership to help channel those ideas into resolutions that are properly developed, representative, and ready for deliberation by the House of Delegates. In this way, we honor both the creativity of our members and the integrity of our governance process.

**519B. Resolved**, that the Standing Rules of the House of Delegates, section titled “Items of Business” in the *Manual of the House of Delegates* be amended as follows (additions underlined, deletions ~~stricken through~~):

*Items of Business*

An item of business becomes the property of the House of Delegates and is subject to House action in accordance with the appropriate order of business and agenda schedule when such item is received in writing by the American Dental Association Executive Director (Secretary of the House) subject to the following conditions:

- ~~1. Reports and resolutions from Association agencies, constituent and component societies, trustee districts, individual delegates, and any three members in good standing are governed by the Association *Bylaws* and the *Manual of the House of Delegates*. The three~~

~~members in good standing submitting a resolution shall have the option to request  
 formatting support from their state or constituent leadership, local district caucuses, and  
 the American Dental Association, who may not block, delay, or alter the substance of the  
 resolution but may assist the members in bringing the resolution into proper order.~~

1. Reports and resolutions from Association agencies, constituent and component societies, and trustee districts are governed by the Association Bylaws and the Manual of the House of Delegates.

2. Constituent and component societies, trustee districts, American Student Dental Association (ASDA), and ADA agencies shall have the authority to submit resolutions to the Association. Constituent and component societies, and trustee districts must collaborate with their individual delegates on resolutions submitted to the Association. Individual delegates may collaborate with members in good standing to develop resolutions that must be submitted to a constituent, component society, and/or a trustee district.

2.3. Resolutions from dental agencies not part of the American Dental Association may become items of business at the discretion of the House if received in writing by the Executive Director (Secretary of the House) at least 15 days in advance of a session.

**BOARD RECOMMENDATION: Vote Yes on the Substitute.**

**Vote: Resolution 519B**

BERG	Yes	DOWD	Yes	KNAPP	Yes	STUEFEN	Yes
BOYLE	Yes	GRAHAM	Yes	MANN	Yes	TULAK-GORECKI	Yes
BROWN	Yes	HISEL	Absent	MARKARIAN	Yes	WANAMAKER	Yes
CAMMARATA	Yes	HOWARD	Yes	MERCER	Yes		
CHOPRA	Yes	IRANI	Yes	REAVIS	Yes		
DEL VALLE-SEPÚLVEDA	Yes	KAHL	Yes	ROSATO	Yes		



1 ADA member for other matters—would advance these values, strengthen governance, educate the  
2 membership, and maintain a durable record for future leaders.

3 This proposal is not intended to restrict the Board’s authority or slow its ability to act. It simply ensures  
4 that members and the public have a clear understanding of the reasoning behind significant decisions. By  
5 making the decision-making process more transparent, the ADA can strengthen trust, demonstrate  
6 accountability, and encourage greater engagement from members and non-members alike.

7 **Resolution**

8 **520. Resolved**, that the American Dental Association *Bylaws*, Chapter V. BOARD OF TRUSTEES,  
9 Section 80. DUTIES, be amended by adding a new duty S. to read as follows (additions underlined):

10 S. prepare and publish a written majority report and, where applicable, a minority report for every  
11 vote falling into any of the following categories:

- 12 (a) Votes to recommend, establish, amend, or rescind ADA policy;  
13 (b) Votes addressing insurance reform, dental benefit plans, or third-party payer relations;  
14 (c) Votes to authorize or take a position on interstate compacts or licensure reciprocity  
15 agreements;  
16 (d) Votes involving legislative or regulatory advocacy at the federal or state level;  
17 (e) Votes committing the Association to a contractual or financial transaction exceeding two  
18 hundred fifty thousand dollars;  
19 (f) Votes that alter the structure, authority, or duties of the House of Delegates, Board of  
20 Trustees, or any standing committee.

21 For all other Board votes, such a report shall be prepared and published upon the written request  
22 of any active, life, retired, or student member of the Association, made to the Executive Director  
23 within 60 days of the vote. The Board shall prepare and publish the report within 30 days of the  
24 vote or of receiving a valid request. The report shall be made available to members in the  
25 ADA.org member area and released to the public.

26 **BOARD COMMENT:** The Board of Trustees appreciates the sentiment behind this resolution - preserving  
27 the reasoning behind decisions, capturing differing perspectives, and ensuring that the rationale behind  
28 decisions is accessible to members. But Resolution 520 overlooks that minority reports are already an  
29 available option in the Association’s governance procedures. The *Standard Code of Parliamentary*  
30 *Procedure*, 2<sup>nd</sup> Edition (the “Standard Code”), the Association’s parliamentary authority under Chapter  
31 XV. of the Association’s *Bylaws*, indicates that a member of a decision-making body may file a minority  
32 report when there is disagreement with the majority view (see, for example, Standard Code sections  
33 25.50, 31.56 and 31.66).

34 As is noted in the resolution, the individual votes of Board members on resolutions of the House of  
35 Delegates are published. Thus, if a member wishes to discover the reasons that led to the recorded  
36 minority vote, the member need only inquire of the Board members who cast votes in support of the  
37 minority position.

38 The Board is also concerned that the resolution calls for a minority report for “every vote” in six broad  
39 subject matter categories; these categories cover a substantial number of decisions that the Board of  
40 Trustees is called upon to make at every meeting. Requiring a minority report in every instance where  
41 there is not a unanimous decision would potentially require a substantial number of reports which, in turn,  
42 would create an impediment to the economical and efficient conduct of business.

43 Finally, the Board of Trustees believes that the requirement sought by Resolution 520 might result in the  
44 members of the Board of Trustees putting aside their minority views to avoid having such view carried  
45 forward in a written report. Thus, instead of the requirement preserving the reasoning behind decisions,

1 capturing differing perspectives, and ensuring that the rationale behind decisions is accessible to  
 2 members, the resolution might well have the opposite effect of chilling debate and dissenting opinions.  
 3 It is for these reasons that the Board recommends that a House of Delegates vote of No, defeating  
 4 Resolution 520.

5 **BOARD RECOMMENDATION: Vote No.**

6 **Vote: Resolution 520**

BERG	No	DOWD	No	KNAPP	No	STUEFEN	No
BOYLE	No	GRAHAM	No	MANN	No	TULAK-GORECKI	No
BROWN	No	HISEL	No	MARKARIAN	Absent	WANAMAKER	No
CAMMARATA	No	HOWARD	No	MERCER	Absent		
CHOPRA	No	IRANI	No	REAVIS	Absent		
DEL VALLE-SEPÚLVEDA	No	KAHL	Absent	ROSATO	No		



1 Several states—including [California, Connecticut, Illinois, Indiana, Massachusetts, New Mexico, New](#)  
2 [York, Oregon, South Carolina, Texas, Vermont, and Washington](#)—have introduced or expanded  
3 legislation to increase oversight of private equity and management services organizations operating in  
4 healthcare. These include both “Mini-HSR” laws requiring pre-transaction notification and approval, and  
5 corporate practice restrictions aimed at preserving the clinical autonomy of licensed healthcare  
6 professionals. These state efforts reflect growing concern over the influence of investor-driven business  
7 models on care delivery and patient outcomes.

8 In June 2025, [Oregon passed SB 951](#), a landmark law restricting private equity and Managed Service  
9 Organization (MSO) control over healthcare practices. The law bans corporate influence over clinical  
10 decisions, prohibits MSO ownership or governance roles, and voids non-compete and control-based  
11 contract clauses. It ensures that only licensed professionals direct patient care. Full compliance is  
12 required by 2029.

13 The Illinois, Oregon, and Washington Dental Practice Acts each reinforce a common standard: licensed  
14 dentists retain ultimate responsibility for patient care, even within corporate or DSO-affiliated structures. In  
15 Illinois, the law states that nothing “shall be construed in any way to relieve the supervising dentist from  
16 ultimate responsibility for the care of his or her patient” (Illinois Dental Practice Act, 225 ILCS 25/2), and  
17 prohibits non-dentists from interfering with a dentist’s clinical judgment (225 ILCS 25/37). Oregon law  
18 further affirms that only licensed dentists may own or operate a dental practice and must designate a  
19 clinical director responsible for diagnosis, treatment, staffing, and the quality of care (Oregon Revised  
20 Statutes 679.020(2) and (4)(a)). In Washington, Senate Bill 5322, enacted in 2017, prohibits third-party  
21 interference in the dentist–patient relationship and ensures that care decisions remain under the  
22 exclusive authority of licensed providers. These laws illustrate the widely shared legal expectation that  
23 clinical accountability cannot be transferred to corporate managers or financial stakeholders.

- 24 • Illinois Dental Practice Act  
25 Section 2: <https://ilga.gov/legislation/ilcs/fulltext.asp?DocName=022500250K2>  
26 Section 37: <https://ilga.gov/legislation/ilcs/fulltext.asp?DocName=022500250K37>
- 27 • Oregon Revised Statutes § 679.020  
28 [https://www.oregonlegislature.gov/bills\\_laws/ors/ors679.html](https://www.oregonlegislature.gov/bills_laws/ors/ors679.html)
- 29 • Washington Senate Bill 5322 (2017)  
30 [Interference with licensee's independent clinical judgment](#). (SB 5322, Section 3, page 3)

31 Several states are currently considering laws that would require healthcare entities, including dental  
32 practices, to disclose ownership and control information. While these measures are still in the proposal or  
33 implementation phase, ADA member practices can demonstrate leadership by voluntarily adopting  
34 transparency practices. This could include clearly identifying the licensed dentist(s) accountable for  
35 patient care, ownership structures, or affiliated management entities on their websites or patient-facing  
36 materials.

37 Ownership transparency is not a restriction on business structure—it is a matter of consumer protection,  
38 accountability, and ethics. It is important to ensure that this policy fully complies with antitrust laws and  
39 Federal Trade Commission regulations, as emphasized in *North Carolina State Board of Dental*  
40 *Examiners v. FTC*, 574 U.S. 494 (2015). The goal is to equip patients with accurate, accessible  
41 information—not to restrict access to care or limit competition.

42 The same owner or management company can operate multiple locations under different names or  
43 brands, which may mislead patients into believing they are switching providers when in fact they are not.  
44 Lack of clarity about who owns and manages a practice makes it harder for patients to know who is  
45 accountable for decisions and creates barriers when concerns arise. It also reduces trust in the  
46 profession and makes it more difficult for employees to resolve issues within their workplace.

1 Clear signage listing both the legal owner of record and any affiliated management company or service  
2 organization responsible for day-to-day operations would give patients accurate information before they  
3 schedule or receive care. This type of visible disclosure would encourage ethical practice operations and  
4 supports transparency across all dental practices, regardless of business model.

5 **Resolution**

6 **522. Resolved**, that the ADA the policy on Transparency in Dental Practice Ownership,  
7 Management, and Outside Investors be adopted as follows:

8 The American Dental Association encourages all state dental boards to require clear and  
9 accessible disclosure of dental practice ownership and financial control for the benefit of patients,  
10 including:

11 (1) the name(s) of the registered owner and licensed dentist(s) legally responsible for patient  
12 care at each location, and

13 (2) if applicable, the name of any Dental Service Organization, management firm, business, or  
14 investor with controlling interest, and

15 (3) such information shall be posted visibly from the patient side of the front desk, published  
16 on the practice website, included in all public-facing marketing materials (including digital  
17 directories and online platforms), and placed on office signage, stationery, and patient  
18 communications,

19 and be it further

20 **Resolved**, that the ADA constituents encourage all state dental boards and relevant authorities to  
21 adopt these transparency requirements, and that the ADA publish sample language and layout  
22 recommendations for signage and disclosures to support practices in implementing these measures  
23 effectively.

24 **BOARD COMMENT:** While the Board supports the spirit of the resolution, transparency in practice  
25 ownership, the Board does not agree with the validity of the inaccurate background information contained  
26 in Resolution 522. It is further concerned that the language contained therein can misguide delegates  
27 during their decision-making process. The Board recommends the following substitute resolution be  
28 adopted.

29 **522B. Resolved**, that the ADA the policy on Transparency in Dental Practice Ownership,  
30 Management, and Outside Investors be adopted as follows (additions underlined, deletions ~~stricken~~  
31 ~~through~~):

32 The American Dental Association encourages all state dental ~~boards~~ societies and constituents to  
33 advocate for laws to require state dental boards to require clear and accessible disclosure of  
34 dental practice ownership and financial control for the benefit of patients, including:

35 (1) the name(s) of the registered owner and licensed dentist(s) legally responsible for patient  
36 care at each location, and

37 (2) if applicable, the name of any Dental Service Organization, management firm, business,  
38 or investor with controlling interest, and

39 (3) such information shall be posted visibly from the patient side of the front desk, published  
40 on the practice website, included in all public-facing marketing materials (including digital

1 directories and online platforms), and placed on office signage, stationery, and patient  
 2 communications,

3 and be it further

4 **Resolved**, that the ADA ~~constituents encourage all state dental boards and relevant authorities to~~  
 5 ~~adopt these transparency requirements, and that the ADA~~ publish sample language and layout  
 6 recommendations for signage and disclosures to support practices in implementing these measures  
 7 effectively.

8 **BOARD RECOMMENDATION: Vote Yes on the Substitute.**

9 **Vote: Resolution 522B**

BERG	Yes	DOWD	Yes	KNAPP	Yes	STUEFEN	Yes
BOYLE	Yes	GRAHAM	Yes	MANN	Yes	TULAK-GORECKI	Yes
BROWN	Yes	HISEL	Absent	MARKARIAN	Yes	WANAMAKER	Yes
CAMMARATA	Yes	HOWARD	Yes	MERCER	Yes		
CHOPRA	Yes	IRANI	Yes	REAVIS	Yes		
DEL VALLE-SEPÚLVEDA	Yes	KAHL	Yes	ROSATO	Yes		

Resolution No. 525 AmendmentReport: N/A Date Submitted: August 26, 2025Submitted By: Council on Government AffairsReference Committee: D (Legislative, Governance and Related Matters)Total Net Financial Implication: None Net Dues Impact: \_\_\_\_\_

Amount One-time: \_\_\_\_\_ Amount On-going: \_\_\_\_\_

ADA Strategic Forecast Outcome: Tripartite: Achieve a stable and successful Tripartite.

**1 AMENDMENT TO THE POLICY, LEGISLATIVE ASSISTANCE BY THE ASSOCIATION**

2 **Background:** In accordance with Resolution 170H-2012, Regular Comprehensive Policy Review  
3 (*Trans.*2012:370), the Council on Government Affairs reviewed the policy titled Legislative Assistance by  
4 the Association (*Trans.*1977:948; 1986:530; 2019:310), with an emphasis on redundancy, continued  
5 need, adequacy (or obsolescence) in modern times, and the merits of any revision(s).

6 The policy originated in 1977 to clarify that the ADA should not seek to amend the laws of a state without  
7 the constituent society's consent. Amendments in 1986 and 2019 clarified that that the ADA was not  
8 prohibited from offering technical assistance, especially by alerting the constituent society about pending  
9 legislation and ensuring the society is aware of the implications. (*Supplement* 1977:392, 421; 1986:225;  
10 2019:5034).

11 The Council seeks to amend to policy to reinforce the autonomy and authority of local dental societies in  
12 addressing state-specific legislative matters. The intent is to ensure the ADA respects the unique needs,  
13 priorities, and expertise of its constituent societies, which are better positioned to understand the  
14 implications of proposed legal changes within their jurisdictions.

15 In addition, by requiring prior written consent, the resolution promotes collaboration, prevents potential  
16 conflicts between national and state-level dental organizations, and ensures that any ADA involvement  
17 aligns with the interests of local dentists and the public they serve, fostering a more cohesive and  
18 effective advocacy framework.

19 The Council notes that the basis for offering technical assistance to constituent societies is codified in  
20 Chapter VIII, Section K.7.d. of the *ADA Governance and Organizational Manual*, which states that one of  
21 the Council's core responsibilities is to "disseminate information which will assist the constituents and  
22 components involving legislation and regulation affecting the dental health of the public."

23 The Council on Government Affairs recommends that the following resolution be adopted.

**24 Resolution**

25 **525. Resolved**, that the policy titled Legislative Assistance by the Association (*Trans.*1977:948;  
26 1986:530; 2019:310) be amended as follows (additions are underscored; deletions are ~~stricken~~):

27 **Resolved**, that the American Dental Association shall not ~~assist~~ provide financial, legal, logistical,  
28 or promotional support to any organization, agency, group, or individual attempting to alter the  
29 laws of a state without the prior written consent and approval of the constituent society of that  
30 state, and be it further

1           **Resolved**, that when the American Dental Association is aware of pending legislation within a  
 2           state which is ~~in opposition to existing Association policy or is otherwise~~ detrimental to the best  
 3           interests of the public, the Association shall inform the constituent society of the implications of  
 4           such legislation, urge the constituent society to take appropriate action and offer assistance in  
 5           addressing the issue.

6           **BOARD COMMENT:** The recommendation of the Board that Resolution 510B be adopted makes this  
 7           Resolution no longer necessary or germane.

8           **BOARD RECOMMENDATION: Vote No.**

9           **Vote: Resolution 525**

BERG	Yes	DOWD	No	KNAPP	No	STUEFEN	Yes
BOYLE	No	GRAHAM	No	MANN	No	TULAK-GORECKI	No
BROWN	No	HISEL	No	MARKARIAN	Absent	WANAMAKER	No
CAMMARATA	Yes	HOWARD	No	MERCER	Absent		
CHOPRA	No	IRANI	No	REAVIS	Absent		
DEL VALLE-SEPÚLVEDA	No	KAHL	No	ROSATO	No		



1           **Resolved**, that the Task Force shall report its findings and recommendations to the House of  
 2           Delegates no later than the 2026 Annual Session.

3           **BOARD COMMENT:** The board appreciates the maker’s intent to create broader engagement among the  
 4           various dental organizations. The ADA routinely communicates with a wide array of organizations within  
 5           organized dentistry including: AAOMS, AAPD, AAE, AAP, IADR, ADEA, ASDA, AGD, AAO, as well as a  
 6           variety of other dental groups and the federal dental services. Regularly, multiple stakeholder groups  
 7           support each other through letters, in-person and virtual meetings and serving as featured speakers in  
 8           various meetings and events. Moreover, stakeholder groups are invited to attend and participate in the  
 9           ADA Lobby Day and the ADA annual lobbyist conference. Leadership meets with fellow leaders among  
 10          other dental organizations where advocacy is consistently listed as an agenda item. As such, the Board  
 11          finds that the ADA’s engagement and communication with various groups within dentistry are sufficient to  
 12          maintain a robust and transparent advocacy engagement.

13          **BOARD RECOMMENDATION: Vote No.**

14          **Vote: Resolution 527**

BERG	No	DOWD	No	KNAPP	No	STUEFEN	No
BOYLE	No	GRAHAM	No	MANN	No	TULAK-GORECKI	No
BROWN	No	HISEL	No	MARKARIAN	Absent	WANAMAKER	No
CAMMARATA	No	HOWARD	No	MERCER	Absent		
CHOPRA	No	IRANI	No	REAVIS	Absent		
DEL VALLE-SEPÚLVEDA	No	KAHL	Absent	ROSATO	No		



1 **Resolution**

2 **510. Resolved**, that the following policy titled “Authority of State Dental Associations in Legislative  
3 Actions” be adopted:

4 **Resolved**, that State Dental Associations shall have primary authority in determining responses  
5 to state-level legislative actions. The ADA shall provide guidance, expertise, and resources to  
6 State Dental Associations upon request, and be it further

7 **Resolved**, that the ADA shall not take unilateral action in state legislative affairs without the  
8 express consent of the respective State Dental Association. Any advocacy efforts at the state  
9 level shall be conducted in alignment with the priorities established by the State Dental  
10 Association. The ADA shall not lobby in opposition to a state’s position on a particular matter.

11  
12 and be if further

13 **Resolved**, that the policy titled Legislative Assistance by the Association (*Trans.*1977:948;  
14 1986:530; 2019:310) be rescinded.

15 **BOARD COMMENT:** The Board appreciates the intention of the maker to clarify the role and activity of  
16 the ADA in the development, support, and implementation of state legislative or regulatory actions.  
17 Further, the Board believes it is necessary to clarify the role and activity of constituent and component  
18 dental societies as they relate to the development, support, and implementation of federal policy, which  
19 shall be held by the ADA.

20 As such, the Board presents an amended version of this Resolution to more comprehensively reflect the  
21 roles and responsibilities of the ADA, constituent and component dental societies in state and federal  
22 advocacy.

23 **510B. Resolved**, that the following policy titled “Authority and Scope of State Dental Associations in  
24 Legislative Actions” be adopted (additions underlined, deletions ~~stricken through~~):

25  
26 **Resolved**, that State Dental Associations shall have primary authority in determining responses  
27 to state-level legislative actions. The ADA shall provide guidance, expertise, and resources to  
28 State Dental Associations upon request, and be it further

29 **Resolved**, that the ADA shall not take unilateral action in state legislative affairs without the  
30 express consent of the respective State Dental Association. Any advocacy efforts at the state  
31 level shall be conducted in alignment with the priorities established by the State Dental  
32 Association. The ADA shall not lobby in opposition to a state’s position on a particular matter,  
33 and be it further

34 **Resolved**, that constituent and component dental societies shall recognize the primacy of the  
35 American Dental Association in setting federal policy positions and acknowledge the American  
36 Dental Association as the governing body for federal advocacy positions. No constituent or  
37 component society shall lobby against, or otherwise advocate in conflict with, positions taken by  
38 the ADA at the federal level.

39 and be it further

40 **Resolved**, that the policy titled Legislative Assistance by the Association (*Trans.*1977:948;  
41 1986:530; 2019:310) be rescinded.

1 **BOARD RECOMMENDATION: Vote Yes on the Substitute.**

2 **Vote: Resolution 510B**

BERG	Yes	DOWD	Yes	KNAPP	Yes	STUEFEN	Yes
BOYLE	Yes	GRAHAM	Yes	MANN	Yes	TULAK-GORECKI	Yes
BROWN	Yes	HISEL	Yes	MARKARIAN	Yes	WANAMAKER	Yes
CAMMARATA	Yes	HOWARD	Yes	MERCER	Absent		
CHOPRA	Yes	IRANI	Yes	REAVIS	Absent		
DEL VALLE-SEPÚLVEDA	Yes	KAHL	No	ROSATO	Yes		

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**WORKSHEET ADDENDUM  
POLICY TO BE RESCINDED**

**Legislative Assistance by the Association (Trans.1977:948; 1986:530; 2019:310)**

**Resolved**, that the American Dental Association shall not assist any organization, agency, group or individual who is attempting to alter the laws of a state without the consent and approval of the constituent society, and be it further

**Resolved**, that when the American Dental Association is aware of pending legislation within a state which is in opposition to existing Association policy or is otherwise detrimental to the best interests of the public, the Association shall inform the constituent society of the implications of such legislation, urge the constituent society to take appropriate action and offer assistance in addressing the issue.





1 All members of the American Dental Association have the right to attend reference committee  
2 hearings and participate in the discussion, whether or not they are members of the House of  
3 Delegates.

4 The *American Institute of Parliamentarians Standard Code of Parliamentary Procedure* (AIPSC (2nd ed.),  
5 Chapter 24, Paragraph 7 states:

6  
7 While delegates should attempt to communicate with their constituents and to learn their opinions,  
8 values, and concerns, it is usually not wise for delegates to be instructed by their constituents to  
9 take specific actions on items of business. The delegates need to be free to listen to the discussion,  
10 weigh the pros and cons, and vote according to what appears to be the wisest course for the  
11 organization. The members whom the delegates represent may be unaware of the full range of  
12 arguments and information to be presented at the convention and cannot know the final wording of  
13 the proposed action if it is amended.

14 As outlined above, the speaking privileges of delegates of the ADA House of Delegates are protected in  
15 the *Standing Rules of the House of Delegates*. Higher order documents of the *Constitution and Bylaws*  
16 enable the *Standing Rules of the House of Delegates*. Reference Committee participation rights of all  
17 ADA members are protected in the *Manual of the House of Delegates*. Trustee Districts and ADA  
18 Constituents have an opportunity to ensure consistency in district and constituent governance documents  
19 while supporting organizational effectiveness.

20 Prior to beginning the reference committee hearing, each chair is requested to read a statement  
21 regarding the rights and privileges of all members of the Association. The proposed addition of a  
22 sentence reminding attendees that a member's right to speak at these hearings cannot be removed by  
23 action of a particular constituent or delegation could be helpful for preserving member rights and  
24 thoughtful deliberation by the ADA House of Delegates.

25 **Resolution**

26 **528. Resolved**, that the ADA urge all districts, constituents, and components to rescind all policies  
27 and rules which restrict the rights of ADA delegates that are outlined in the *ADA Manual of the*  
28 *House of Delegates* and the parliamentary authority of the ADA House of Delegates, and be it further

29 **Resolved**, that the Speaker is urged to amend the subsection, *Conduct of Hearings*, in the section,  
30 *General Procedures for Reference Committees*, of the *2025 Manual of the House of Delegates* as  
31 follows (additions underscored, deletions ~~stricken through~~):

32 **Conduct of Hearings**

33 \* \* \*

34 Prior to beginning the reference committee hearing, each chair is requested to read the following  
35 statement:

36 All members of the American Dental Association have the right to attend and participate in the  
37 reference committee hearing, whether or not they are members of the House of Delegates.  
38 This member right of open testimony may not be removed or compromised by constituent or  
39 trustee district rules. However, nonmembers of the Association may participate in the  
40 discussion at this hearing with the consent of a majority of the reference committee. Members  
41 of this Association who are not members of the House of Delegates and nonmembers of the  
42 Association have been provided the opportunity to submit written testimony. Any written  
43 testimony submitted by the October 2 deadline is posted in the House of Delegates  
44 community on ADA Connect. At this time, I respectfully request that all members of the media

1 and other nonmembers, excluding component, constituent and ADA staff, to identify  
2 themselves.

3 American Dental Association staff members are available at this hearing to provide  
4 information requested by members of the reference committee or through the chair by those  
5 participating in the discussion.

6 In accordance with the ADA Disclosure Policy, at the appropriate time anyone present at this  
7 meeting is obligated to disclose any personal, professional or business relationship that they  
8 or their immediate family may have with a company, professional organization or individual  
9 doing business with the ADA, when such company, professional organization or person is  
10 being discussed. This includes, but is not limited to insurance companies, sponsors,  
11 exhibitors, vendors and contractors.

12 At this hearing, you must first identify those relationships before speaking on an issue related  
13 to such conflict of interest.

14 **BOARD RECOMMENDATION: Received after the August 2025 Board of Trustees Meeting.**



1            2.3. Resolutions from dental agencies not part of the American Dental Association may become  
2            items of business at the discretion of the House if received in writing by the Executive  
3            Director (Secretary of the House) at least 15 days in advance of a session.

4            **BOARD RECOMMENDATION: Received after the August 2025 Board of Trustees Meeting.**

Resolution No. 531 New

Report: N/A Date Submitted: 10/10/2025

Submitted By: Third Trustee District

Reference Committee: D (Legislative, Governance and Related Matters)

Total Net Financial Implication: None Net Dues Impact: \_\_\_\_\_

Amount One-time: \_\_\_\_\_ Amount On-going: \_\_\_\_\_

ADA Strategic Forecast Outcome: Tripartite: Achieve a stable and successful Tripartite.

1 **ADDRESSING APPARENT INACCURACIES IN THE 2026-2029 DELEGATE ALLOCATION**

2 The following resolution was submitted on Friday, October 10, 2025, by Ward Blackwell, executive  
3 director, Pennsylvania Dental Association on behalf of the Third Trustee District.

4 **Background:** As has been clear for roughly a year, the transition to a new CRMS/AMS software,  
5 Salesforce/Fonteva, has not gone smoothly. Huge issues with membership renewals for 2025 were  
6 reported by the vast majority of constituent societies using the system. For many months in late 2024 and  
7 well into 2025, membership data were found by many to be all but useless and membership figures were  
8 inaccurate by hundreds or thousands of members in some cases. As a result, the reporting of 2024 year-  
9 end membership totals was significantly delayed. As the delay dragged on, the possibility of constituents  
10 independently replicating the year-end data for comparison diminished. And even when the year-end  
11 membership totals finally were disseminated by the ADA in April/May of this year, confidence in those  
12 figures was not especially high. The data for many states showed significant declines in members and/or  
13 market share that were difficult to align with their experience/history. And to the extent that any portion of  
14 that decline was real, it was impossible to tell with certainty to what degree the issues plaguing the  
15 software may have contributed.

16 Little has changed since then to significantly increase confidence in those 2024 year-end numbers. For  
17 example, constituent societies have been told for months now that the goal is to get the  
18 Salesforce/Fonteva system functioning at the level of a "Minimally Viable Product" (MVP). Yet, the  
19 regular, lengthy reports of problems and fixes show no sign of abating soon. And while the considerable  
20 effort of ADA staff and the new contractors towards this objective are greatly appreciated, the confidence  
21 in the system and the data obtainable remains shaky across the tripartite as accounts of discrepancies in  
22 member records and errors in processes circulate continually.

23 If we've learned anything from the troublesome rollout of Salesforce/ Fonteva, it is that there is value to  
24 taking the time needed to make sure we get things right. And, if there unquestionably were glaring issues  
25 with the accuracy of ADA membership data just months ago, and to this day there continue to be  
26 numerous and significant problems with the software used to produce it, how can there be high  
27 confidence now that any calculation of representation in the House of Delegates based on that data is fair  
28 and accurate (i.e., right)?

29 Given the above, it hardly makes sense to base delegate allocation for the coming *four years* on  
30 membership figures for which confidence is likely the lowest in the memory of anyone serving in the  
31 House. We acknowledge that it is impossible to know if the degree of inaccuracy in the data used to  
32 calculate the new delegate allocation is sufficient to significantly change that allocation. But it in the  
33 interest of fairness and restoring confidence, the PDA would propose the following resolution.

1

**Resolution**

2 **531. Resolved**, that the delegate reallocation scheduled to be implemented in 2026 pursuant to  
3 section B. of the portion of the Manual of the House of Delegates entitled "Representation of  
4 Constituents and Periodic Reapportionment of Delegates and Alternate Delegates" be postponed for  
5 one year provision in the Manual of the House of Delegates stipulating reallocation of delegates  
6 should next take effect for the 2026 House of Delegates be suspended for one year, with the  
7 allocations for the 2025 House remaining in effect for the following year, and be it further

8 **Resolved**, that the four-year schedule for reallocation of delegates re-start after this one-year  
9 suspension with the next reallocation to take effect for the 2027 House of Delegates and commence a  
10 new four-year cycle thereafter, and be it further

11 **Resolved**, that the introductory paragraph to Section B. Delegate Allocation Methodology, of  
12 *Representation of Constituent and Periodic Reapportionment of Delegates and Alternate Delegates*,  
13 as published in the *Manual of the House of Delegates*, be amended by addition (new language  
14 underscored):

**B. Delegate Allocation Methodology.**

16 Commencing in 2014, based on the representational requirements and goals set forth in this  
17 *Manual* and in the *Governance Manual*, delegates shall be allocated according to the allocation  
18 methodology set forth below. Thereafter, to account for membership fluctuations, delegate  
19 allocations shall be reviewed and delegates shall be reallocated by the Secretary of the House of  
20 Delegates every four (4)\* years among the Association's constituents, the five (5) federal dental  
21 services and the American Student Dental Association in accordance with that same  
22 methodology. Delegate allocations shall be based on the Association's year-end membership  
23 records for the second calendar year preceding the year in which the delegate allocations  
24 become effective. The review of delegates shall take place as soon as possible after the  
25 membership numbers on which the delegate allocations are based are available. The Secretary  
26 of the House of shall publish the new delegate allocations expeditiously thereafter to the  
27 constituent dental societies, the five (5) federal dental services and the American Student Dental  
28 Association. The delegate allocations shall also be published in this Manual. The delegate  
29 allocation methodology is as follows:

30 \* To accommodate the Association's transition of the new CRMS/AMS software, CMS/AMS  
31 platforms, the delegate reallocation scheduled to be implemented in the Year 2026 is postponed  
32 to the Year 2027. With this one-year postponement, the four-year schedule for reallocation of  
33 delegates shall re-start in 2027 and commence a new four-year cycle thereafter.

34 **BOARD RECOMMENDATION: Received after the August 2025 Board of Trustees Meeting.**



Resolution No.	529	New
Report:	N/A	Date Submitted: 10/7/2025
Submitted By:	Georgia Dental Association	
Reference Committee:	D (Legislative, Governance and Related Matters)	
Total Net Financial Implication:	\$74,000	Net Dues Impact: \$1
Amount One-time:	Amount On-going: \$74,000	
ADA Strategic Forecast Outcome: Tripartite: Achieve a stable and successful Tripartite.		

1 **VIRTUAL TOWN HALL BETWEEN THE BOARD OF TRUSTEES AND THE HOUSE OF DELEGATES**

2 The following resolution was submitted on Tuesday, October 7, 2025, by Dr. Peter Shatz, delegate,  
3 Georgia on behalf of the Georgia Dental Association.

4 **Background:** Transparent, two-way communication between the ADA Board of Trustees (Board) and the  
5 House of Delegates (House) strengthens governance, builds trust, and improves policy outcomes.  
6 Delegates benefit from timely briefings on strategic issues, emerging policies, and budgetary matters prior  
7 to convening. A virtual forum scheduled sufficiently in advance allows Delegates to gather input from  
8 constituents and prepare informed testimony.

9 This resolution establishes a recurring, scheduled virtual town hall to improve pre-meeting dialogue  
10 between the Board and the House. It supports better prepared debate, increases transparency, and  
11 allows Delegates and Alternate Delegates to surface constituent priorities before formal deliberations.

12 The proposed virtual town hall should be hosted on a secure virtual platform selected by ADA. Its agenda  
13 should include strategic updates, budget highlights, policy previews, and open Q&A.

14 **Resolution**

15 **529. Resolved,** that the American Dental Association host and facilitate a virtual town hall with all  
16 interested Delegates and Alternate Delegates no less than thirty (30) days prior to the start of each  
17 ADA House of Delegates, and be it further

18 **Resolved,** that notice of the town hall include a proposed agenda and instructions for submitting  
19 questions in advance, which shall be provided to Delegates and Alternate Delegates no less than  
20 fourteen (14) days before the town hall, and be it further

21 **Resolved,** that the town hall provide live Q&A with reasonable time allocation for Delegates and  
22 Alternate Delegates from each trustee district, and that the session be recorded and made available  
23 to all Delegates and Alternate Delegates within five (5) business days, and be it further

24 **Resolved,** that the ADA ensure reasonable accommodations and virtual access (e.g., closed  
25 captioning) and provide a written summary of questions and responses within ten (10) business days  
26 of the town hall, and be it further

- 1        **Resolved**, that the Board include in its Annual Report to the House a brief summary of town hall
- 2        participation, key themes, and any follow-up actions taken.
  
- 3        **BOARD RECOMMENDATION: Received after the August 2025 Board of Trustees Meeting.**