



# Connecticut State Dental Association

## Membership Manual

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## Introduction

This manual has been prepared to provide our members and staff with a clear understanding of our association’s membership policies and the rules that govern the operation of our councils.

## Revisions

This document may be revised by a two-thirds majority vote of the CSDA House of Delegates.

## Section 1: Classification

The membership of this Association shall be composed of ethical and reputable dentists as well as other qualified non-dentists as follows:

### A. Active members:

1. Definition: Individuals who hold a D.D.S., D.M.D. or equivalent degree may be an Active member of this association.
2. Application: An eligible individual must submit an ADA or CSDA approved application to the CSDA Membership Department.
  - a) Constituent Society Review: The CSDA Membership Department will check the appropriate state licensing website(s) for information related to the suspension or revocation of an applicant’s dental license(s). The results of these searches will be provided to the component society for their review.
  - b) Component Society Action: The application for membership will be forwarded to the secretary or other designated officer of the component society for review and approval consistent with their governing policies. Approval of such applications may not be withheld by a component society unless they can demonstrate that the applicant does not qualify for membership as defined by the ADA and CSDA bylaws. Component societies have 30 days to act upon such an application or the individual will be deemed to have been automatically elected. Individuals who had their dental license suspended or revoked are not eligible for this automatic election and the component society may take longer than 30 days to determine if the application should be approved. An applicant will officially become an Active member once the individual has paid their tripartite dues and been elected to Active membership by the appropriate component society.
3. Dues: The amount of dues an Active member is assessed can vary depending on whether the individual qualifies for any discounts or obtains a waiver.
  - a) Full Dues: The full, undiscounted dues rate for an Active member is \$478.00 per year.
  - b) Half Year Dues: Active members elected to the Association after July 1 and before the end of the calendar year will be subject to payment of one-half (1/2) of the Full Dues of this Association.

- c) Discount for Recent Dental School / Residency Graduates: CSDA members that have recently graduated from dental school or an advanced training program and qualify for the ADA Reduced Dues Program will be eligible for the CSDA Dues Equity Plan once in their practicing lifetime. Member eligibility will commence on January 1 following graduation from dental school or an advanced training program.

The Dues Equity Plan is as follows:

- 25% of Full Dues the first full calendar year after dental school or completion of advanced training;
  - 50% of Full Dues the second calendar year;
  - 75% of Full Dues in the third calendar year;
  - 100% of Full Dues in the fourth calendar year
4. Privileges: An Active member shall have the following privileges of membership:
    - a) An active member in good standing shall receive publications of the Connecticut State Dental Association.
    - b) An active member shall be entitled to attend any scientific Conference of this Association and such other services as are provided by the Association and shall pay the applicable registration fees for such activities.
    - c) An active member in good standing shall be eligible for election as a delegate or alternate delegate to the House of Delegates and for election or appointment to any office or agency of this Association, except as otherwise provided within any CSDA manuals or governing documents.
    - d) An active or life member under disciplinary sentence of suspension shall not be privileged to hold office, either elective or appointive, including delegate and alternate delegate, in such member's component society and this Association, or to vote or otherwise participate in the selection of officials of such member's component and this Association.

**B. Retired members:**

1. Definition: Individuals who hold a D.D.S., D.M.D. or equivalent degree may become a Retired member if the person does not receive or earn any income from dental-related activity.
2. Application: An applicant must complete and submit an *ADA Retirement Affidavit* to the CSDA Membership Department to attest that the individual has satisfied the criteria for Retired membership as defined by the ADA.
  - a) Tripartite Approval: Pursuant to ADA membership policies this form must be signed by an officer or executive director of a component society as well as the CSDA Executive Director before it can be submitted to the ADA for final approval. The CSDA will ensure that the local component society has signed the ADA Retirement Affidavit before the Executive Director also signs the form and forwards it to the ADA.
3. Dues: All Retired members shall pay dues of 25% of Full Dues per year to this Association plus any and all dues and assessments to the American Dental Association.
4. Privileges: A Retired member shall have the following privileges of membership:
  - a) A Retired member in good standing may submit a written request to be

included on the mailing list for publications from the Connecticut State Dental Association.

- b) A Retired member shall be entitled to attend any scientific Conference and other such functions as the CSDA shall sponsor and shall pay any applicable Retired member rates for such activities.
- c) A Retired member in good standing is eligible for election as a delegate or alternate delegate to the House of Delegates and for election or appointment to any office or agency of this association, except as otherwise provided within any CSDA manuals or governing documents.
- d) A Retired member is eligible to serve on CSDA councils and committees.

**C. Affiliate members:**

- 1. Definition: Affiliate members are dentists practicing in any other state or officers of a federal dental service who are members of the American Dental Association. The Board of Governors shall elect them.
- 2. Applications: An eligible individual may submit a CSDA Membership Application through the Executive Director to the Board of Governors for approval.
- 3. Dues: All affiliate members shall be members of the American Dental Association and shall pay to this Association one-half (1/2) of the Full Dues rate required for active members.
- 4. Privileges: An affiliate member in good standing shall be entitled to all the privileges of an active member, except holding any office or appointed position in the Association.

**D. Life members:**

- 1. Definition: An individual who holds a D.D.S., D.M.D. or equivalent degree must fulfill all of the criteria listed below to become either an Active Life or Retired Life member:
  - a) Age Requirement: A life member shall be a member of this Association who has reached the age of sixty-five (65) years in the previous calendar year or be over the age of sixty-five (65) when he/she satisfies the Length of Membership Requirement.
  - b) Length of Membership Requirement: a life member must have been an active or retired member in good standing for thirty (30) consecutive years, or a total of forty (40) years
    - 1) Reduced Length of Membership Requirement: An individual who has been a member of the National Dental Association for twenty-five (25) years and subsequently at least ten (10) years of membership in the American Dental Association shall be deemed to have satisfied this length of membership requirement.
  - c) Dual membership categories:
    - 1) Active Life: An individual who qualifies for both the Active and Life membership categories is considered to be an Active Life member.
    - 2) Retired Life: An individual who qualifies for both the Retired and Life membership categories is considered to be a Retired Life member
- 2. Application: No application is necessary for Life membership. ADA and CSDA

staff update an individual's membership category once the member has satisfied the criteria outlined above.

- a) Report to the House of Delegates: CSDA staff shall provide the House with a list of members who will qualify for life membership during the next membership year.
3. Dues:
    - a) Active Life Dues: Members shall pay 75% of CSDA full dues.
    - b) Retired Life Dues: Life members who satisfy the criteria for Retired membership shall not be subject to any dues or assessments.
  4. Privileges: Active Life members in good standing shall be entitled to all the privileges of an Active member while Retired Life members shall be entitled to all the privileges of a Retired member.

E. **Student Members:**

1. Definition: An individuals may become a student member if they satisfy either of the following criteria:
  - a) Is enrolled as a predoctoral student at a dental school accredited by the Commission on Dental Accreditation; or
  - b) Hold a D.D.S., D.M.D. or equivalent degree and is engaged full-time in an advanced training course of not less than one academic year's duration in an accredited school or residency program.
2. Application: An eligible individual must submit an ADA Graduate Student / Resident application to the CSDA Membership Department.
  - a) Component Society Action: The application for membership will be forwarded to the secretary or other designated officer of the component society for review and approval consistent with their governing policies. Approval of such applications may not be withheld by a component society unless they can demonstrate that the applicant does not qualify for Student membership as defined within this manual. Component societies have 30 days to act upon such an application or the individual will be deemed to have been automatically elected. An applicant will officially become a student member once the individual has paid the appropriate ADA dues and been elected to Active membership by the appropriate component society.
3. Dues: Students shall not be subject to dues or assessments of this Association
4. Privileges: A Student member shall have the following privileges of membership:
  - a) A Student member in good standing shall receive publications of the Connecticut State Dental Association.
  - b) A Student member shall be entitled to attend any scientific Conference of this Association and such other services as are provided by the Association and shall pay the applicable registration rates for such activities.
  - c) A Student member is eligible to serve on CSDA councils and committees.
  - d) A Student under disciplinary sentence of suspension shall not be privileged to hold office, either elective or appointive, including delegate and alternate delegate, in such member's component society and this Association, or to vote or otherwise participate in the selection of officials of such member's component and this Association.

**F. Honorary Members**

1. Definition: An individual who has made outstanding contributions to the art and science of dentistry may be elected an honorary member.
2. Application: An individual may not apply for this category. Honorary members are nominated by the Board of Governors and elected by the House of Delegates.
3. Dues: Honorary members shall not be subject to dues or assessments of this association.
4. Privileges: An individual elected to this category may claim honorary membership in the CSDA. An Honorary member shall not have the privilege of voting or holding office in the CSDA.

**G. Auxiliary life member:**

1. Definition: Spouses and/or dependents of deceased active or life members shall be considered auxiliary life members of the CSDA.
2. Application: No application is necessary for Auxiliary life membership.
3. Dues: Auxiliary Life members shall not be subject to any dues or assessments.
4. Privileges: Auxiliary Life Members may participate in CSDA endorsed insurance programs and services that are available to the spouses and/or dependents of CSDA members.

**Section 2: Membership in Good Standing**

In order to become and remain a member in good standing an individual must satisfy the following requirements:

**A. Financial Obligations**

A member is considered to be in good standing when payment for all applicable dues and assessments is current. Active, Retired and Life members may also become members in good standing upon the waiver of their membership dues as provided within the policies of this manual.

**B. Remain in Good Standing with Other Organizations**

Active, Retired, Student and Life members must remain a member in good standing of the American Dental Association and a Connecticut component society with geographic jurisdiction over the area where the individual either resides, or is employed or practices. Affiliate members are required to remain a member in good standing of the constituent and component society located in the state where they maintain their tripartite membership in the American Dental Association.

**C. Temporarily Under Suspension**

An individual whose membership is suspended as provided within these bylaws is designated as a “member in good standing temporarily under suspension” until the end of their disciplinary penalty.

## D. Additional Requirements

1. Component Society Requirements: Active, Retired, Student and Life members may be required under their component society bylaws to meet specific standards of continuing education, cooperate with peer review bodies, or as a new member attend a stated number of membership meetings.
2. Professional Conduct Proceedings: Members in good standing shall cooperate with any bodies that are convened to review a complaint that is filed with this association
3. as provided within these bylaws and the policy manual.

## Section 3: Waivers

- A. The following dues waivers are available for Active, Life and Retired members subject to the review and approval of the ADA, CSDA and their local component society.
  1. Active-Duty Military: This waiver is for those who are called to temporary active military service.
  2. Financial Hardship and Disability Waivers: Individuals who have a medical condition that prevents them from engaging in the practice of dentistry for an extended period of time or who suffer a significant financial hardship may apply for this waiver.
  3. Humanitarian Practitioner Waiver: This waiver is available to those who are serving dentistry full-time for a humanitarian organization. To qualify for this waiver an individual may receive neither income nor a salary for that service other than a subsistence amount which approximates a cost-of-living allowance. An individual must also remain in service continuously for a least one year and not supplement his or her income by the performance of services as a member of the faculty of a dental or dental auxiliary school, as a dental administrator or consultant or as a practitioner of any activity for which a license to practice dentistry or dental hygiene is required.
- B. Application: Anyone seeking a dues waiver must complete and submit an ADA *Request for Membership Dues Waiver* form to the CSDA Membership Department.
  1. Additional Documentation:
    - a) Active-Duty Military: Requests for this type of waiver must include a copy of the appropriate orders or government documents that can confirm the individual has been called to active military service.
    - b) Financial Hardship and Disability Waivers: Component societies may request additional financial documents as they deem appropriate to verify an individual's eligibility for this waiver. If the waiver request is related to a health condition that is preventing an individual from practicing dentistry then the member's treating physician must sign it.
    - c) Humanitarian Practitioner Waiver: These requests must include a signed letter from the individual's organization and the *ADA Humanitarian Practitioner Application*.
  2. Tripartite Approval: Pursuant to ADA membership policies these forms must be signed by an officer or executive director of a component society as well as the

CSDA Executive Director before it can be submitted to the ADA for final approval. The CSDA will ensure that the local component society has signed the appropriate forms before the Executive Director also signs the form and forwards it to the ADA for final approval.

- C. Dues:
1. Active-Duty Military: The dues shall be waived for members who are called to temporary active military service for the duration of the active military service and will be pro-rated accordingly.
  2. Financial Hardship and Disability Waivers: Those who have suffered a significant financial hardship or a permanent/temporary disability which prohibits them from payment of their full dues may be excused from the payment of fifty percent (50%), or all of the current year's dues.
    - a) Discretion of the Component Society: The individual's component dental society will determine which percentage of a dues waiver to offer to the member.
    - b) Adjusted Dues Rate: Pursuant to ADA membership policies all dues' waivers are based off the Full Dues rate assessed to Active members. This applies even when an individual's normal dues rate is lower than the Full Dues rate. Therefore, when considering a waiver for Active Life or Retired members as well as Active members who participate in the dues equity plan, the local component society shall take the individuals actual dues rate into account when determining which percentage of a dues waiver to offer a member.
  3. Humanitarian Practitioner Waiver: The dues shall be waived for members who qualify for this special ADA membership category.
- D. Privileges: Providing a waiver to an individual does not change their membership category. Active, Life and Retired members who receive a full or partial dues waiver will still receive all the privileges of membership for their respective membership category.
- E. Length of Waiver:
1. Permanent Waiver: An individual who has surrendered their dental license due to a health condition that prevents the member from practicing dentistry is eligible for a permanent waiver.
  2. Temporary Waiver: Active-Duty Military waivers are granted for the duration of their call up to active duty. All other waivers are granted for the remainder of the year. However, individuals may apply for another waiver in subsequent years.

#### **Section 4: Provisional Membership**

New applicants for the Active, Retired, Affiliate and Student membership classes shall be granted provisional membership upon the submission of the appropriate application and payment of any applicable fees. This includes without limitation any dues or assessments that may be charged by the American Dental Association or one of our local component societies. Provisional membership will provide the applicant with access to membership benefits while the appropriate body reviews their

pending membership application. In the event an application is rejected because the appropriate

body determines that the individual is not eligible for that membership class, the individual will receive a full refund of their membership dues. Once an application is approved the individual will become a member in good standing as otherwise provided within these bylaws.

## Section 5: Resignation and Reinstatement

- A. If a member resigns while there are charges of conduct subject to discipline still pending, then any later application for readmission to membership shall be conditioned on their submitting to a hearing on said charges.
- B. Any member dropped from membership in this Association for non-payment of dues and/or assessments may be reinstated at the discretion of the Board of Governors upon such terms and conditions as the Board prescribes.
- C. Any member dropped from membership in this Association as a result of disciplinary action by the Ad Hoc Judicial Affairs Committee may submit an application for reinstatement no earlier than one year from the effective date of expulsion from this Association and may be reinstated at the discretion of the Board of Governors upon such terms and conditions as the Board prescribes.

## Section 6: Councils

- A. **List of Standing Councils and their individual responsibilities:**
  - a) The **Council on Governmental Affairs (CGA)** shall be responsible for:
    - a) Creating, monitoring, and responding to legislation in all forums having impact upon the membership of the CSDA;
    - b) Protecting and furthering the interests of the public and the dental profession in matters of patents and regulations;
    - c) Disseminating information concerning the enactment and enforcement of legislation affecting the dental health of the public to the membership of the Association.
  - b) The **Council on Constitution and Bylaws** shall be responsible for:
    - a) Maintaining the articles of the Constitution and Bylaws so that they reflect the current framework and structure of the Association;
    - b) Providing interpretations and advisory opinions regarding matters pertaining to the Constitution and Bylaws to any member or agency of the Association;
    - c) Reviewing all proposed changes to the Constitution and Bylaws for proper legislative form prior to their submission to the House of Delegates of this Association for action.
  - c) The **Council on Peer Review** shall be responsible for:
    - a) Recommending policies, standards, principles, and guidelines, subject to the approval of the Board of Governors and the Association, for the

- implementation and operation of Peer Review at the component and state levels;
    - b) Monitoring the efficiency of the Association's Peer Review system as delineated in the Association's Manual on Peer Review;
    - c) Conducting Final Review when requested by a peer review participant and when the necessary criteria have been met; and;
    - d) Conducting its business according to the guidelines set forth in the Association's Manual on Peer Review;
  - d) The **Council on Membership** shall be responsible for:
    - a) Developing, implementing, and maintaining the Association's member recruitment and retention programs;
    - b) Working in conjunction with other agencies of the Association and the component societies in support of a strong, unified membership.
  - e) The **Council on Insurance** shall be responsible for:
    - a) Assessing the insurance needs of the Association and its operating entities and making recommendations to the Board of Governors concerning such needs;
    - b) Assessing the insurance needs of the membership of the Association and making recommendations to the Board of Governors concerning such needs;
    - c) Advising and instructing the Association and its membership on insurance matters.
  - f) The **Professional Development Council** shall be responsible for:
    - a) Supporting and enhancing the professional development of dentists at all stages of their careers through education, training, networking, and other activities. Designing and delivering engaging, high-quality blended programming.
    - b) focused on identifying the educational needs of the member dentist and their staff and developing continuing education programs to support these needs
    - c) Expand the variety and reach of professional learning opportunities.
    - d) Incorporate relevant research and development into professional learning.
    - e) Work with staff identify and recommend instructors, specific topics, and relevant ideas that may be developed into educational course offerings
    - f) Promote a positive member experience at all professional learning offerings i.e., annual conference, CE Series, hands on, and online events
    - g) Review projected budget for new course development to be approved prior to launching any new activity.

## **B. Council Appointments**

1. Identify Potential Volunteers:
  - a) The Council on Membership will contact all existing council members on an annual basis to determine which individuals are interested in being reappointed to their current positions or pursuing opportunities on other councils.
  - b) The Council on Membership will issue an open call for new volunteers on an annual basis in order to identify other individuals who may wish to join our councils
  - c) The district representatives on the Board of Governors are also encouraged to speak with their caucus delegation, local component society officers and other

colleagues to identify potential volunteers who may be willing to serve on our councils. Each district representative may recommend one or more eligible members from their district for nomination to each council.

2. Appointment: The Board of Governors will review this information and appoint the members who will serve on these Councils during the next fiscal year.
3. Notification: The Board of Governors will submit a report to the House of Delegates at least forty-five (45) days prior to the Annual Session which identifies the names and districts of those members who were appointed to the standing Councils of the CSDA.

### **C. Additional Appointments and Ex-Officio Members**

- a) Supplemental Council Appointments: The council chair may request that the Board appoint additional council members if necessary.
- b) Student Appointments: The ASDA chapter of the University of Connecticut School of Dental Medicine may also nominate members from their organization to serve as the dental student representatives to the Council on Membership and Council on Legislation. Student representatives may also be appointed to other councils by this ASDA chapter with the permission of the appropriate chair.
- c) Appointment of Consultants: Each council shall have the authority to appoint consultants, advisors, and additional personnel in conformity with the rules and regulations established by the Board of Governors.
- d) Board Liaisons: The President of this Association shall appoint one or more members of the Board to each council as a liaison between the council and the Board. The Board liaison shall have no right to make motions or vote.
- e) Ex-Officio Members:
  - A. President: Serves as an Ex-Officio member without voting privileges on all Councils.
  - B. Speaker of the House: Serves as an Ex-Officio member without voting privileges on the Council on Constitution and Bylaws.

### **D. Conflicts of Interest**

- a) As a condition of appointment Council nominees, consultants and staff shall file conflict of interest statements with the Executive Director of this Association.

### **E. Council Chairs**

- a) Term Limits for Council Chairs
  - a) Starting in 2017 any individual who has been chair of a council for five consecutive years would be ineligible to serve as chair of that specific council for a period of five (5) years.
    - 1) After five years that individual would regain their eligibility to serve as a chair of the council in question for another maximum of five (5)

- consecutive years.
- b) Individuals who reach these limits on a specific council may still serve as a member of that council but would not be eligible for election or appointment as Chair.
- 
- b) Election of Council Chairs
    - a) By the Council: Each council of this Association shall have a chair elected annually by the members of that council.
      - 1) Deadline: Each of the councils shall endeavor to elect a council chair by June 15th following the Annual Session at which the members have been approved by the House of Delegates.
      - 2) Options: The councils shall use the most expedient means possible to elect a chair, including but not limited to fax and email votes.
      - 3) Co-Chairs: A council may elect two eligible members to serve as equal co-chairs with the consent of both candidates and a majority of the council members.
    - b) By the Board: The President shall appoint a council chair or co-chair, with the approval of the Board of Governors, when the council has failed to do so by next regularly scheduled Board meeting after the June 15th deadline.
  - c) Duties of the Chair or Co-Chairs: It shall be the duty of the council chair or co-chair to submit reports in a timely fashion to the Executive Director prior to the Annual Meetings of the House of Delegates. Each council chair shall be responsible:
    - a) To report directly to and at the discretion of the Board of Governors;
    - b) For the transmission of information between the Board of Governors and the committee chair and;
    - c) For the decisions reached by the council.

#### **F. Appointment of Subcommittees**

Committees and subcommittees of the various councils may be formed at the discretion of the council chair or co-chairs.

### **Section 7: Electronic Communications Policy**

This policy applies to emails, text messages, social media posts, private messages, and similar electronic communications on any electronic platform or through any service sent by or received from any CSDA member that relates to CSDA business.

- a. Electronic communications generally may be copied, forwarded to, or shared with recipients other than the intended recipients. In the absence of any language in the communication, such as stating the communication is confidential, the sender implicitly permits a communication to be copied, forwarded to, or shared with other people.
- b. Any sender intending an electronic communication to be confidential and viewable only by one or more designated recipients is required to expressly state in the communication that the communication is confidential. Use of the terms “Confidential,” “Private,” or “Do Not Share”

- are sufficient to notify each recipient that the communication may not be copied, forwarded, or shared without express permission from the sender.
- c. Electronic communications sent to the BOG, the Officers, or any CSDA committee or subcommittee may be shared with members outside the BOG, Officers, committee, or subcommittee unless the sender includes language in the communication stating that the communication is confidential or private. If the sender states that the communication is confidential, then express permission of the sender is required to copy, forward, or share the communication outside the BOG, the Officers, or any CSDA committee or subcommittee.
  - d. At times, information may be communicated that is protected from disclosure because it was communicated in executive session, because it is protected by the attorney-client privilege, because it is confidential protected health information under HIPAA, or because it contains confidential or proprietary information or trade secrets. Any such information is confidential and may not be copied, forwarded, posted, or otherwise disclosed regardless of whether the communication is labeled “Confidential,” “Private,” or “Do Not Share.”
  - e. Electronic communications by and among the BOG, councils, committees, and subcommittees should be respectful and professional. Foul language, personal attacks, talking behind the backs of members, and inappropriate use of images or symbols are considered unethical, unprofessional, and violative of CSDA standards.
  - f. Electronic communications may be directed to one member on a thread or group containing other members. If a communication is directed to a particular person, then generally only that member to whom the communication is directed should respond.
  - g. Members intending to provide advice, feedback, or constructive criticism to any other member should consider an in-person meeting, using the telephone, or using a private message rather than sending a message in a group chat, group email, or otherwise including other members. The CSDA encourages direct communications on these subjects.
  - h. Posts by members on social media (e.g., Facebook, Twitter, etc.), websites, and other platforms should be respectful and appropriate. CSDA board members, councils, committees, and staff should conduct themselves in a professional manner, including when communicating on social media.
  - i. CSDA members may disagree, debate, and share opinions publicly. But the use of insulting or offensive language is considered unprofessional and unethical.
  - j. Zoom, Teams, WebEx, Skype, and other video meeting platforms require the same protocols as in-person meetings. The CSDA follows the Standard Code of Parliamentary Procedure. Yelling, interrupting, and writing unprofessional remarks in a meeting chat or other communication are considered inappropriate, unprofessional, and unethical behavior. Video meetings may not be recorded without the permission of all participants. Any questions about this policy should be directed to the CSDA’s executive director.

## **Section 8: CSDA Policy Regarding Discipline**

The Connecticut State Dental Association (CSDA) members are expected to conduct themselves in accordance with the ADA Code of Conduct. The CSDA expects all CSDA members to comply with the intent and the spirit of these values. Failure to conduct behavior according to these policies may result in disciplinary proceedings.

## ADA/CSDA Member Conduct Policy

1. Members should communicate respectfully in all interactions with other dentists, ADA and CSDA members, Association officers, trustees, and staff.
2. Members should respect the decisions and policies of the Association and must not engage in disruptive behavior in interactions with other members, Association officers, trustees, or staff.
3. Members have an obligation to be informed about and use Association policies for communication and dispute resolution.
4. Members are expected to comply with all applicable laws and regulations, including but not limited to antitrust laws and regulations, and statutory and common law fiduciary obligations.
5. Members must respect and protect the intellectual property rights of the Association, including any trademarks, logos, and copyrights.
6. Members must not use Association membership directories, on-line member listings, or attendee records from Association-sponsored conferences or continuing education courses for personal or commercial gain, such as selling products or services, prospecting, or creating directories or databases for these purposes.
7. Members must treat as confidential all confidential information furnished by the Association as such and must not reproduce materials without the Association's advance written approval.
8. Members must not violate the attorney-client privilege, or the confidentiality of executive sessions conducted at any level within the Association. At the end of an executive session, the group will determine what is specifically allowed to be shared outside the executive session and report in any minutes issued by that group.
9. Members must fully disclose conflicts, or potential conflicts, of interest and make every effort to avoid the appearance of conflicts of interest.
10. Members shall conduct themselves in a manner that does not reflect negatively on the dental profession, and our tripartite ADA organization.
11. Members must comply with all policies of the CSDA.
12. Members must avoid representing opinions or positions that are opposed to the position of the CSDA, unless they specifically state that they are giving a personal opinion and not that of the CSDA.

### **Disciplinary Actions**

Disciplinary actions may include loss of CSDA membership, suspension of membership, censure, and other actions determined to be appropriate to address any misconduct or behavior.

Additionally, members elected to office within the CSDA or representing the CSDA may have their elected duties curtailed and may be removed from office.

Examples of conduct **VALID** for removal from **office**:

1. Continued gross, or willful neglect of the duties of the office, which in part, include duties of care, loyalty, and diligence, in addition to breach of fiduciary duty.
2. Actions that intentionally violate the bylaws.
3. Failure to comply with the proper direction given by the House of Delegates or the board.
4. Failure or refusal to disclose necessary information on matters of organizational business.
5. Unauthorized expenditures, signing of checks, or misuse of organization funds.
6. Unwarranted personal attacks on any officer, member of the Board of Governors, on an ongoing basis or after written warning to cease such attacks.
7. Misrepresentation of the organization and its officers to outside persons.
8. Conviction of a felony.

9. Willfully taking actions that undermine Board of Governors policies.
10. Failure to comply with the Electronic Communications policy (see Membership Manual)

Examples of conduct **NOT VALID** for removal from **office**:

1. Poor performance as an officer due to lack of ability.
2. Negligence that is not gross or willful.
3. A tendency to create friction and disagreement.
4. Mere unsuitability to hold office.
5. Irrational behavior as a result of mental illness, disease, or addiction (however, the individual should be contacted and referred for help as appropriate).

### **Disciplinary Procedures**

While the CSDA must act to protect itself from actions that reflect negatively on it, the rights of our members must also be protected. Therefore, the following procedures are established to provide a disciplinary process that grants our members appropriate treatment while protecting the CSDA.

#### **A. Definitions**

**Censure** is a written disciplinary sentence expressing severe criticism or disapproval of a particular conduct or act. Censure may be public or private.

**Suspension** means all membership privileges except continued eligibility to coverages under insurance programs are lost during the suspension period. Suspension shall be unconditional and for a specified period at the termination of which full membership privileges are automatically restored. A subsequent violation shall require a new disciplinary procedure before additional discipline may be imposed.

**Removal from office** means removal from an appointed or elected office following a hearing and finding by the body from which the person was appointed or elected to the office.

**Expulsion** is an absolute discipline and may not be imposed conditionally except as otherwise provided herein. Due to our tripartite structure this would necessitate removal as a member of the entire tripartite system. Any proposal for expulsion should be reviewed with the legal department at the ADA.

**Probation** to be imposed for a specified period and without loss of rights, may be administratively and conditionally imposed when circumstances warrant in lieu of a suspended disciplinary penalty.

Probation shall be conditioned on good behavior. Additional reasonable conditions may be set forth in the decision for the continuation of probation. *In the event that the conditions for probation are determined to have been violated, the individual will be offered an opportunity to be heard in accordance with the Bylaws. If it is determined that the individual violated the conditions of probation, the original disciplinary penalty shall be automatically reinstated; except that, when circumstances warrant, the original disciplinary penalty may be reduced to a lesser penalty. There shall be no right of appeal from a finding that the conditions of probation have been violated.*

**The Ad Hoc Judicial Committee** is a committee that consists of three members of the CSDA in good standing who represent the diverse nature of the CSDA. The Council on Ethics Review will appoint the committee.

#### **B. Informal Resolution of Disagreements**

The CSDA encourages members to resolve disagreements amongst themselves, if possible. If not, then the CSDA provides the following steps to help resolve the disagreement.

1. Members with a disagreement should try to resolve the disagreement amongst themselves. The resolution of the disagreement does not need to be public.

2. In the event of a disagreement during a council or committee meeting, the affected members first should try to resolve the issue with the member or members, as applicable. If unsuccessful, then complaining member should report the issue to the chair.
  - a. If the issue is a Board concern, the Board President should be contacted.
  - b. If the issue concerns the Board President, then the executive director should be contacted.
  - c. If the issue concerns the Executive Director, then the chair of the personnel committee should be contacted.
  - d. If the issue concerns a component society, then the component society president should be contacted.
  - e. If the issue concerns the president of a component society, then the CSDA president or Executive Director should be contacted.
3. If the disagreement is not resolved, then the next step is for the president, the executive director, or committee chair, as appropriate, to facilitate a conversation between the parties to help them resolve their issue. If a resolution is not agreed upon, then the complaint is brought to the Council on Ethics Review

#### C. Censure

Censure is not considered severe discipline since it does not curtail or eliminate the rights of the member. The steps to impose censure, whether private or public, are:

1. The Council on Ethics Review will decide if an issue is to go through the censure process versus a hearing.
2. Once an issue is brought to the Council on Ethics Review, the Chair of the Council on Ethics Review and the Executive Director should maintain a file on the issue. This file will be confidential. The file is to be maintained for historical data to aid in making future decisions if there is a member with any additional complaints against them.
3. The process for censure for all individuals is for the chair of the Council on Ethics Review to contact the parties to obtain information and try to help them reach an agreement.
4. The Chair of the Council on Ethics review will call a meeting of the Council on Ethics Review in closed session to review and discuss the issue. It will be decided by the council whether the issue is valid and if censure is appropriate.
  - a. If Censure is appropriate, a confidential letter of censure will be shared with both parties in closed session.

#### D. Hearing

Upon referral from The Council on Ethics Review, to the Ad Hoc Judicial Committee, a hearing should then be held in closed session within 30 days. In conducting the hearing, the Committee should preserve decorum and fair play; only consider evidence and testimony related to the written charges; uphold the right of the accused member to present a defense, cross-examine witnesses, and offer a refutation to the charges that have been made; deliberate and decide the outcome based on the evidence free from bias and outside influence; and render a decision on the charges expediently based on the evidence provided during the hearing.

1. Charges made by a member in writing, stating the alleged violations shall be filed with the chair of

the Council on Ethics Review, the Executive Director, the three members of the Ad Hoc Judicial Committee,

2. The Chair of the Ad Hoc Judicial Committee will investigate necessary documents and information that need to be present at the hearing.
3. At a closed session of the hearing, the member bringing the charges and the member being charged will present their testimony and any documentary evidence related to the charges. The Committee will hear the testimony, review any documentary evidence, deliberate, and then issue a written decision.
4. The member being charged and the member submitting the charges will be informed of the decision. All proceedings are confidential and held in closed session.

*The steps for imposing severe discipline are specifically stated in our adopted parliamentary authority, The Standard Code of Parliamentary Procedure.*

#### E. Appeals process

After all processes are exhausted, or within 30 days of notice of the decision, suspension, or expulsion meted out to any active, life or retired member, including those instances when the disciplined member has been placed on probation, shall be promulgated by such member's component society and this Association. All materials, notes, minutes involved with the process will remain in a confidential file held by the Executive Director and the Council of Ethics Review Chair.

The participants have the right to appeal the process to the House of Delegates, for a final ruling. The process will consist of a special convening of the HOD in closed session, officiated by the speaker and the voting delegates, CSDA attorney, Executive Director, the Board of Directors, and necessary staff. This session will be no more than 3 hours and decisions are final.

## **Section 9: Resignation Policy**

A member has the right to resign at any time. A member's resignation from the Association becomes effective 48 hours after notification, unless some future time is specified by the resigning member, and no acceptance of it is necessary to make it effective.

An officer, board member, council and committee member, or ADA delegate may resign from their position/office at any time by submitting a statement of resignation in writing to the executive director. The resignation of a position/office is not a resignation from the Association. The resignation can be withdrawn within 48 hours after the executive director acknowledges the resignation with a written response (emails are acceptable) in return.

A resignation effective at some future date may be withdrawn until it has been accepted, or until the effective date of the resignation. A person who has resigned cannot simply resume office because of a change of mind but can only be restored to office by reelection at the HOD if it was an elected office, or reappointment to the committee or council by Board of Governor vote. After resigning, an officer, committee or council member, or ADA delegate continues to be liable for acts committed or concurred in before resignation. If a member resigns while there are charges of conduct subject to discipline still pending, then any later application for readmission to membership shall be conditioned on their submitting to a hearing on said charges.

### **Reinstatement**

Any member who has been expelled and wishes to be reinstated as a member of the Association shall be subject to the conditions of application as otherwise provided within these bylaws.

Any member dropped from membership in this Association as a result of disciplinary action by the Ad Hoc Judicial Affairs Committee may submit an application for reinstatement no earlier than one year from the effective date of expulsion from this Association

### **Section 10: Term Limits**

A. All instances referring to term limits in the House of Delegates Manual, Board of Governors Manual, and the above referenced section (six) of this manual will apply the following to term limits.

1. A position being vacated due to the current office holder being term limited may be filled by the current office holder under the following conditions.
  - a. Any and all deadlines for nominations pass and no nominations are received, and
  - b. The current office holder is willing to serve one year term, and
  - c. The current office holder confirms their willingness to continue in office before any deadline to select the position, and
  - d. For positions elected at the annual HOD meeting, a member wishing to hold their position must announce their intention at least thirty days prior to the meeting.