

EDWARD H. ANGLE
NORTHERN CALIFORNIA
ORTHODONTIC SOCIETY
POLICY AND PROCEDURE MANUAL

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TABLE OF CONTENTS

I. INTRODUCTION

II. GENERAL POLICIES

III. DUTIES OF OFFICERS

President

President-Elect-Program Chair

Secretary

Treasurer

Director to the EHASO

Immediate Past-President

IV. BOARD OF DIRECTORS

V. STRUCTURES AND DUTIES OF COMMITTEES

Executive Committee

Bylaws Committee

Clinical Evaluation Committee

Equipment Committee

Membership Committee

Nominating Committee

Policy and Procedure Manual Committee

Thesis Committee

Ad Hoc Committees

Financial Committee

VI. ATTACHMENTS

Candidate/Guest Information Form

Policy Regarding Guests/Guest Fees

Member's Sample Introductory Letter to the BOD

Secretary's Letter to New Prospective Member

Officers, Directors and Committee Members

I. INTRODUCTION

The purpose of this manual is to define the policies and procedures of the Edward H. Angle Northern California Orthodontic Society (EHANCOS) and to help guide and direct members and others providing the Component's leadership and administration.

The policies and procedures contained herein may not change the EHANCOS Bylaws nor can they be in conflict with the Bylaws of the Edward H. Angle Society of Orthodontists (EHASO).

This manual is intended to be a living and dynamic document to be revised as needed. Any changes must be approved by the Board of Directors (BOD).

II. GENERAL POLICIES

Rules of Order: The current Sturgis Standard Code of Parliamentary Procedure shall govern the Component deliberations and meetings.

Component Banking: The official EHANCOS bank is at the discretion of the current Treasurer. Accounts from the bank shall be used for all disbursements and deposits. A single signature is required for disbursements up to \$8000. Savings are required to be held in government insured vehicles.

Committees: A number of standing committees have responsibilities that assist in the management and operations of the Component. The standing committees include: Executive, Bylaws, Clinical Evaluation, Financial, Membership, Nominating, Policy and Procedure, Thesis, and the Welcome Committee. The President shall have the authority to appoint additional Ad Hoc committees when the need arises and dissolve them similarly. The AD HOC committees presently include: Equipment, Financial, Away Meetings, and Biennial.

Guests: The EHANCOS is supportive of and recognizes the need for maintaining a strong Component through solicitation of guests who have the potential for becoming Angle Society members. The Guest Introducing Letter to the BOD (Attachment #1) must be submitted for all guests except residents. See also the Policy Regarding Guests (Attachment #2) The Guest's Welcome Letter (Attachment #3).

Use of Mailing Lists/Roster: Use of the mailing lists or roster of EHANCOS members is restricted to official Component business.

Death of a member: In the event of a death of a member, the Secretary will send a card to the family and the Treasurer will send a \$100 donation to the EHASO Foundation.

III. DUTIES OF OFFICERS

President:

The President is responsible for overseeing the business of the EHANCOS during the two (2) year term of office and for conducting all official meetings of the Component, including serving as moderator of the Board of Directors. The President's objective is to lead the organization in maintaining its mission to achieve a high caliber educational experience for the members in order that they continue in their professional growth and enjoy the fellowship of this organization.

The President may establish an agenda for the term of office and make periodic reports to the Board of Directors and the membership regarding the President's evaluation of the status and vision of the EHCOS. Unless otherwise provided for in the Bylaws, the President shall appoint all committee members and establish a Chair of each committee, as well as fill all committee vacancies. The President shall serve as an advisory member of all committees without the right to vote. As a member of the BOD, the President has the right to vote on any issue addressed by that body. In case of a permanent absence on any committee, the President may appoint a suitable representative to serve as a replacement.

Several weeks prior to each meeting of the Board, the President shall establish the agenda for the upcoming BOD meeting. The President generally conducts a virtual BOD meeting one week prior to or an in-person BOD meeting at 7:30-9:00 am preceding each regular meeting of the Component membership, but the time may vary depending on the agenda. The President is responsible for the orderly and constructive adherence to the agenda to accomplish the business needs of the organization. If additional business is required after 1.5 hrs of meeting time, the President may call the BOD back into session at a later time. The BOD has final say by majority vote in matters requiring a definitive resolution.

Meetings are held at a convenient location approved by the Board of Directors. There are normally three meetings in a calendar year. Urgent business of the Component that cannot be deferred until the next meeting of the BOD may be decided upon by the President and other members of the Executive Committee acting on behalf of the BOD and shared with the BOD at the earliest opportunity no later than the next regularly scheduled meeting of the BOD. On the meeting day, the President will welcome members and permit hosts to introduce their guests, offer introductory comments and conduct any business that is required of the organization, such as announcements, recognition of guests and/or new Active members and oversee parliamentary procedure in all conduction of business.

Following the term as President, the new Past-President becomes Chair of the Nominating Committee.

President-Elect – Program Chair:

The President-Elect is second in line to the President and shall assist the President in the performance of presidential responsibilities. After initial announcements by the President, the President-Elect will introduce each speaker. The President-Elect will produce and give each speaker a certificate of appreciation following each presentation. In the absence of the President, the President-Elect shall conduct the business of the Component and preside over the meetings of the Board of Directors. At the conclusion of the second Component year, the President-Elect automatically ascends to the office of President.

The President-Elect is the Program Chair of the Component and as such, is responsible for establishing the program for each EHANCOS meeting making all necessary arrangements with speakers, establishing the program, printing the program, selecting the meeting location site, and for general oversight of the successful completion of the meeting. Meetings should be planned as far in advance as possible. Our goal is to have meetings scheduled as much as 12 months in advance. As installation of officers occurs in January, the new Program Chair will begin to solicit speakers for the following January as well as any meetings prior to that for which speakers have not been completed. The Program Chair must coordinate his speaker calendar with the Membership Chair to assure that our Affiliate members have first access to presenting on a specific meeting date. Affiliate priority in scheduling is necessary in order for the Affiliate to complete the membership requirements in the time frame allotted.

Meetings are held at a convenient location approved by the Board of Directors. There are normally three meetings in a calendar year as follows: January, March, and early November. In years when the EHANCOS conducts the biennial meeting, our fall meeting usually is not held. The Program Chair is responsible for overseeing the printing or digitally distributing the meeting program.

The Program Chair must correspond with the speakers to:

- a) Solicit the speaker to present
- b) Confirm their speaking engagement (minimum 8 weeks before the meeting)
- c) Assist with any unusual lodging and/or flight arrangements
- d) Secure a title, CV and photo for inclusion in the meeting program(4 weeks before meeting), set up and printing of the meeting programs
- e) Ensure the speaker honorarium is approved by the BOD, if any, and deliver check from the Treasurer.
- f) Deliver Angle sealed speaker certificates at the meeting

The Program Chair will use the following as guidelines for speaker honorariums:EHANCOS members shall not be compensated for their presentations, but present periodically in order to maintain their active membership status. Angle members from outside the geographic area of the EHANCOS, may receive a stipend plus travel and lodging expenses deemed by the board. They may receive up to \$2000. Non-members may receive up to \$500 and/or travel and lodging. Normally non-member guest presentations at \$2000 are limited to one time per year, but under unusual circumstances. The Program Chair will propose guest speakers to the BOD for approval.

The President-Elect Program Chair will organize the President's Dinner for the outgoing President at the January meeting.

General meeting responsibilities:

- a. Email program a minimum of four weeks in advance of the meeting using the current membership list. The Program Chair will also be responsible to email the program to all potential new Affiliate members for future meetings. Hardcopy programs should also be brought to the meeting.

b. Send a luncheon request card with the program mailing to be returned to the Treasurer along with any guest(s) or additional lunch payment due.

The Program Chair will review with the meeting site personnel the room layout, AV needs, timeliness of breaks, etc. and establish a menu for the luncheon as well as confer with the Equipment Chair to see that all is in order. The Treasurer reports the registration figures and pays the facility.

On the meeting day, the Program Chair will welcome the speaker(s), attend to their needs, introduce them and in general conduct the meeting once the President's comments have been concluded.

Secretary:

The overall responsibility of the Secretary is to document all business activity of the Component as well as the duty of receiving and sending all Component correspondence and reporting the same to the Board of Directors (BOD) at their regular meetings. Copies of correspondence shall be forwarded to the President for edification as appropriate. The Secretary has the responsibility to certify all official acts of the Component and perform other such duties as assigned by the President. In the EHANCOS, the Secretary may serve in this capacity for multiple years without progression to the Presidency.

General responsibilities of Secretary:

1. All correspondence including prospective member post meeting letter, processing new members, and maintaining the master correspondence file.
2. Maintain master log of members' attendance and program participation.
3. Create minutes of all board meetings and the annual business meeting, and maintain the master minutes file.
4. Update membership roster annually (have update cards sent with November/December's program announcement) and have roster distributed by email and updated on website.

5. Maintain CE provider status with Board of Dental Examiners (forms are sent by them bi-annually around November). Prepare printed CE slips for each scientific meeting or distribute electronically.
6. Prepare membership certificates with seals for new Active Members (calligraphy).
7. Obtain plaque for outgoing President delivered at January meeting.
8. Maintain name tags and stationery supply.
9. E-mail revised Bylaws and Policy and Procedure Manual to all members and to all new Affiliate members upon their acceptance.
10. Keep a copy of the original Articles of Incorporation and current copies of the Component Bylaws and Policy and Procedure Manual.

Board of Directors meeting responsibilities:

1. In advance of each Board of Directors meeting, mail or E-mail the following to all board members (and others who so request):
 - a. Copy of minutes from the previous meeting.
 - b. CV's and any other pertinent information on proposed new members.
 - c. Any correspondence received that may require board action.
2. Transcribe minutes of the BOD meeting (recording is invaluable).
3. Bring the following to each meeting:
 - a. Extra copies of 1a-c, above.
 - b. Name tags, attendance sheets (and clipboard), CE slips.
 - c. Reference materials: Bylaws, Minutes file, Correspondence file, Current Roster, Attendance log.

Contacts to Angle Central Body

EHASO Association Manager

Christopher Lapine

Allen Press, Inc.

810 East 10th Street Lawrence, KS 66044

clapine@allenpress.com

(785) 865-9210

(785) 843-1274 Fax

Treasurer:

The Treasurer is responsible for maintaining all of the financial records for the EHANCOS. The Treasurer estimates the budget for the coming year in conjunction with the other Board members, specifically the Program Chair and sets the annual member dues currently at \$395. The Treasurer is the chief financial officer of the organization (subject to the BOD) and must report all financial matters directly to the BOD. Based on the proposed expenses, the Treasurer recommends the dues amount to the BOD and bills the members.

The Treasurer will send out notification of each meeting three months prior, one month prior, and two weeks prior using Greenvelop member software. RSVPs will be required five days before each meeting with guest registration. The treasurer will give the secretary a list of guests two days prior to each meeting.

The EHASO Central Body dues, Angle Memorial fund, subscriptions to the Angle Orthodontist, and voluntary contributions to the Angle Heritage Fund are billed by the EHASO directly to the members, Central Body dues are presently \$695. Close coordination with the Secretary is necessary to maintain a current list of Active, Senior Active and Senior Retired, and Affiliate members so that billing can be accurate. Senior retired members do not pay membership dues. Affiliates will pay dues for the year of their acceptance as affiliates if there are additional in person Northern California Component Meetings scheduled for the dues year. A separate budget and

assessment may be necessary for special programs, joint meetings with other components, or EHASO biennial/meetings.

Money is deposited to a EHANCOS account in a bank convenient to the Treasurer. A minimum of \$10,000 is to be maintained in the checking account at all times. Reserve funds are maintained in an interest bearing account and transferred to the checking account as needed for disbursement. All money must be kept in accounts that are insured. The savings and checking accounts shall have the President and President-elect as signers, as well as the Treasurer. Only one (1) signature is required for writing checks or withdrawing funds up to \$8000. Checks or the withdrawing of funds above that amount will require two (2) signatures. The Treasurer pays all expenses out of the NorCal Angle checking account. All expenditures must be supported by an invoice or receipt.

Expenses include meeting costs (speaker honorariums, room rental, food, transportation, etc.), Directors/Officers liability insurance, Nonprofit tax filing, printing, mailing, supplies, equipment, etc. The Treasurer reports to the Board of Directors at each meeting on the financial status. The records are made available to the Board for their inspection. Third party oversight shall be provided on an annual basis by the chairman of the Finance Committee. A Treasurer's report is made to the entire membership at the annual business meeting (January).

The Treasurer will send any notification of guests attending the next meeting to the Hospitality Chairman, Program Chair, and Secretary. After each meeting the Treasurer will bill guests in accordance with the guest fees as stated in attachment #2 of the Policy and Procedure Manual.

Director to the EHASO:

The EHASO Director is the Component representative (EHANCOS) to the Board of Directors of the EHASO (The Central Body). Each component has one representative whose collective responsibility is to manage the business of the EHASO. The Director is elected by the component for a term specified in the Bylaws of the EHASO. The Director serves as a voting

member on the component BOD and makes reports to the component BOD regarding EHASO business. The Director to the EHASO should be an experienced member within the component organization and have the confidence of the membership. The Director must possess good communicative skills to serve effectively in this national position. This representative will serve as the EHASO President for a two year period when the next biennial meeting is hosted by our component. As such, the director will have all the responsibilities of the Presidency of the EHASO as set forth within EHASO Bylaws.

Immediate Past-President:

The Immediate Past-President shall serve on the BOD as a voting member whose primary responsibilities shall include serving as the Chair of the Nominating Committee. In such capacity, this person has the responsibility to arrange and to conduct a meeting of the Nominating Committee for the purpose of nominating new officers of the organization. Thereafter, the names of the nominees shall be presented by the Chair to the BOD and to the membership in accordance with the Bylaws of the EHANCOS. As an experienced leader of the Component, the Past President shall confer and offer assistance to the President as requested by the President.

IV. THE BOARD OF DIRECTORS (BOD)

Officers and Directors of the BOD constitute the governing body of the EHANCOS. Directors are elected annually by the membership to serve a term of years determined by the Nominating Committee. Normally each Director begins a five (5) year term starting on a staggered year which is subsequently reduced by one year at each annual reelection. The BOD of the EHANCOS currently consists of the President, President-elect, Secretary, Treasurer, EHANCOS Director to the EHASO, Immediate Past-President and five directors totaling eleven (11) voting members. The Directors and officers to the BOD have full authority to conduct the Component business as described in the Bylaws of the organization.

The BOD meets before each meeting of the Component. Currently the in-person BOD meetings are held at 7:30-9:00 AM or the virtual BOD meetings are held one week prior to the scientific session. If necessary to finish Component business, the Board may recess and reconvene later at a time at the discretion of the President.

V. STRUCTURE AND DUTIES OF COMMITTEES

EXECUTIVE COMMITTEE: (ExCom)

The Executive Committee (ExCom) shall be comprised of the President, President-Elect, Secretary, Treasurer, the Immediate Past-President and the Northern California Director to the EHASO. The committee shall have the authority to conduct the Component business during times when the BOD cannot be summoned to meet and business is urgent for the best interests of the EHANCOS. Issues undertaken and decisions made by the ExCom shall be related to the full Board at the earliest possible time, no later than the next meeting of the BOD.

BYLAWS COMMITTEE: (BC)

The Bylaws Committee consists of the President and two members appointed by the President, one being the secretary for the purpose of recommending to the BOD revisions in the Bylaws that may be deemed appropriate and necessary for the proper functioning of the Component. The Bylaws must be in compliance with the EHASO Bylaws. The Chair shall be appointed by the President or shall be the senior member in tenure of appointment. This committee must study all recommendations by the BOD regarding bylaws issues and report its recommendations to the BOD.

CLINICAL EVALUATION COMMITTEE: (CEC)

The Clinical Evaluation Committee consists of a Chair and a minimum of five committee members for the purpose of examining a prospective member's clinical presentations to the Component. This committee and Chair is appointed by the President. The Clinical Evaluation Committee Chair as leader of the Clinical Evaluation Committee (CEC) has the

responsibility to monitor and facilitate the Affiliate member's progress in fulfilling the clinical requirements towards attaining Active membership in the Angle Society. In so doing, the CEC Chair must:

- A. Work with the Affiliate and the sponsors in selecting appropriate cases to be presented to the committee and ultimately to the members.
- B. Monitor the Affiliate's progress and encourage the sponsor's participation in the process.
- C. Keep the Membership Chair aware of the Affiliate's progress in fulfilling the requirements on schedule.
- D. Arrange to obtain the records from the Affiliate one week prior to the regular meeting of the Component at which the records are to be presented/displayed. The CEC Chair must arrange a meeting of the Clinical Evaluation Committee to review the six cases (6) to be presented. This meeting has traditionally been held during the four weeks preceding the regular meeting of the EHANCOS. The committee evaluates the cases and determines their level of acceptance according to the prescribed format used for judging cases. The currently acceptable case presentation format was presented to the Affiliate by the Membership Chair in an initial mailing when the Affiliate began the membership process. This information is in the Policy and Procedure Manual and also on file with the Membership Chair.

The CEC Chair must formulate the committee's report and submit it to the Board of Directors at the BOD meeting prior to the next regular meeting of the Component. After acceptance of the Clinical Evaluation Committee recommendations by the BOD, the CEC Chair will do one of the following:

- A. IF THE CASES ARE ACCEPTED: arrange with the Program Chair for display of the cases at a future meeting and discuss with the Affiliate any suggestions or criticisms of the cases by the committee.

B. IF THE CASES ARE UNACCEPTABLE: discuss with the Affiliate the deficiencies in the cases presented and any necessary changes or improvements required to bring the cases to an acceptable level. The Chair must also discuss with the sponsors the areas of deficiency and enlist their assistance in helping the Affiliate succeed. Although there has been a traditional format for presentation and judging of the cases, the Chair and the committee should continually look for ways to upgrade and improve this procedure. Our goal is to have thinking, engaged, and contributing members.

EDITOR-PHOTOGRAPHER

The Editor shall be in charge of submitting photographs and articles to the national component on a quarterly basis to be included in the Angle Newsletter. The Editor shall also be in charge of the EHANCOS website content and future changes.

EQUIPMENT COMMITTEE: (EC)

This committee shall consist of two (2) members appointed by the President for a period of four years. One member will be the Chair and the second member shall act as the backup when the Chair is unavailable or unable to perform the necessary duties. It shall be the duty of this committee to provide the necessary audio-visual equipment for speakers at regular Component meetings. This includes microphones, podium, lights, screens, LCD projector, and any specialized equipment required by a particular speaker. Members of this committee shall be of assistance to speakers in operating equipment, projectors, etc. This would of necessity require close coordination with the Program Chair. It shall be the duty of this committee to maintain the Component's equipment in acceptable working order and to make recommendations to the Board of Directors where the purchase of additional equipment becomes necessary. It is also their duty to ensure the safe storage of any equipment owned by the Component.

HOSPITALITY COMMITTEE: (HC) The Hospitality Chair will receive a guest list from the Treasurer for the upcoming meeting and shall

immediately send each guest an email welcoming them to the EHANCOS as well as a guest information form (see Attachment #1) which is to be returned to the Chair prior to the meeting. The Chair is also responsible for the availability of these guest application forms at the check in table prior to the meeting. The Chair will share completed forms with the other members of the committee. The Hospitality Committee has the responsibility to welcome and introduce guests to individual Angle members, discuss requirements for membership with the guest, and sit with the guest during lunch. The host will introduce the guest at the beginning of the membership meeting. Immediately after the meeting, the Chair will send a copy of the guest information form to the Secretary who will scan the forms, create a file and send the name of the host or guest who needs to be billed in accordance with attachment #2 in the Policy and Procedure Manual to the Treasurer.

MEMBERSHIP COMMITTEE: (MC)

In instances of Active members wishing to introduce potential new members to the organization for the first time, members should first contact the Secretary by written communication (see Attachments #1, 2, and 3).

The Membership Chair serves as lead of the Membership Committee in the EHANCOS. This person is appointed by the President. The Membership Chair is responsible for overseeing the status of membership in the Component jointly with the Secretary. Primarily, the Chair must keep an accurate record of Affiliate member progress toward full membership and report to the Board of Directors that same progress. The Chair's duty is to establish a requirement timetable for the Affiliate member according to the Bylaws of the Component, to inform the Affiliate of the same, and oversee and encourage timely completion of the requirements. The Chair must coordinate the Affiliate's timetable and confer with the Program Chair who will establish a specific meeting for the Affiliate's presentation to the membership.

The Membership Chair is responsible for sending appropriate correspondence to the Affiliate member following approval of their Affiliate status and notification by the Secretary. This shall include the currently acceptable case presentation format. Similarly the Chair must send copies of the appropriate correspondence to the sponsors, Secretary, Thesis and Clinical Chairs, and the President. Specific letters, forms, and other written communication are established and are in the Policy and Procedure Manual and in possession of the Chair.

During the period while the Affiliate member is completing Active membership requirements, the Membership Chair has ongoing responsibilities. Several weeks prior to the BOD meeting, the Chair should confer with the Affiliate member and ascertain the Affiliate's progress toward timely completion of requirements. The Chair should also confer with the Thesis, Clinical and Program Chairs as appropriate either preceding or following discussion with the Affiliate member. These conversations should be part of the Chair's report to the BOD. Regarding membership status of all Active members, Active members-at-large, Senior active members, and Senior retired members, the Membership Chair is responsible for knowing their status, attendance and contribution to the organization. The Chair should confer with the Secretary to gain this information and present any concerns regarding membership to the BOD.

If the BOD mandates presentations by the members to maintain membership, enforcement of this decision would be the responsibility of the Chair with reports to the BOD. In all cases the Membership Chair should be encouraging to all status of members and attempt to enroll them into becoming more participatory members for the benefit of the Component as well as the EHASO.

NOMINATING COMMITTEE: (NC)

The Nominating Committee (NC) has the responsibility for selecting candidates for officers and directors of the Component. The NC is chaired by the Immediate Past-President, who shall convene a meeting for the purpose of selecting such a slate prior to the annual business meeting of

the Component, currently in January. Duties and responsibilities of this committee are described under Immediate Past-President. This committee is composed of the Immediate Past-President and the two most recent past Presidents.

POLICY AND PROCEDURES MANUAL COMMITTEE: (PPMC)

This committee shall consist of the three (3) members appointed by the President to the Bylaws Committee. The term of office will coincide with that of the Bylaws Committee and the Chair of this committee shall also be the Chair of the Bylaws committee. It shall be the duty of this committee to make recommendations on revisions to the Policy and Procedure Manual as may be deemed advisable for the improvement of the Component, and not in conflict with the NorCal EHASO Bylaws or the EHASO Bylaws and Policies. It also shall study all amendments proposed by members or the Board and report its recommendations to the BOD.

THESIS COMMITTEE: (TC)

The Thesis Committee consists of a Thesis Chair and two members appointed by the President. It is important that the committee members are familiar with scientific research and writing, and thus, are usually university associated. The Chair works with the Membership Chair in establishing the due dates and approval of the steps toward completion of the thesis requirement. Each Affiliate member must submit, and have approved, a thesis proposal and progress report by the assigned dates. Feedback to the Affiliate member may include suggestions for extensive revision or minor comments and approval. The Chair is expected to report the progress of the Affiliates with their thesis projects on a regular basis at the Board of Directors meetings. The completed thesis, preferably in publication format, must be submitted to the Thesis Committee for approval well before the time scheduled for the oral presentation. Guidance and suggestions can be provided as requested at any point in the project.

Ad Hoc committees may be appointed by the President when it is deemed purposeful for the conduct of Component business not requiring the time and energies of the full Board. These committees are appointed by the President, who also has the authority to dissolve the committee upon the completion of its task.

FINANCIAL COMMITTEE: (FC)

Financial committee which should consist of the Financial Committee Chair, the Treasurer, and the President. An annual audit of the financial reports which consists of bank statements and income tax filing reports will be done by the Chair of the financial committee.

AWAY MEETING COMMITTEE: (AM)

The away meeting committee shall consist of the host, the Treasurer, Program Chair, President, and other entrusted members. Member will work together to prepare the details of the away meeting.

BIENNIAL COMMITTEE: (B)

The Biennial committee assembles every 14 years to host the national EHASO meeting. The Central body representative is the chair. The executive committee are members. Other members are invited to help in the planning and hosting of the multiple day national meeting.

Northern California Angle Society of Orthodontists

POLICY REGARDING GUESTS/GUEST FEES

1. The Angle Society is a highly valued professional organization and is committed to maintaining a dedicated membership of highly skilled orthodontists who interact for professional learning and fellowship. Each member is greatly valued by the organization.
2. The long term viability of the organization depends upon each member participating in assuring new members are received into the Society regularly.
3. Every member is encouraged to bring as an invited guest(s) any potentially qualified Orthodontist (see Attachment #1). The Component will incur the lunch cost for such a guest for the first two visits.
4. The guest will register and list the sponsoring member.
5. The Secretary will keep records of the guests and share the information with the Treasurer.
6. After two meetings for a guest at which the lunches are hosted by the NorCal EHASO, the Treasurer will bill the inviting member listed for each additional meeting attended for the amount of \$85, the average cost incurred by the Component. The total number of meetings paid by the NorCal EHASO for each guest will be limited to two regardless of who is listed as the member having invited the guest to any one particular meeting.
7. The Treasurer will bill \$85 to the sponsoring member of non orthodontist guests such as other medical/dental professionals and member's friends/family including spouse, on each attendance occasion. It will still be necessary to follow steps 4 and 5 as above. For sites other than The

Claremont Golf and Country Club or the Dugoni/Pacific Dental School, the treasurer will bill the actual cost of the meal to the sponsoring member.

8. Lunch for guests invited by the Angle presenter at a meeting will be billed to that presenter, unless the guest has a speaking part in the presentation. The number of lunches paid by the EHANCOS for speaking guests of a single Angle presenter will be limited to two per meeting. If there is more than one Angle presenter at a meeting, the EHANCOS will pay for a maximum of two speaking guests per speaker with a maximum of four speaking guests regardless of the number of Angle presenters. EHANCOS will pay for the sponsor's lunch up to two guest lunches.

9. Costs for student guests and faculty from area university residency programs will be absorbed by the EHANCOS as approved by the BOD.

Attachment #1

Edward H. Angle Northern California Orthodontic Society MEMBER'S SAMPLE INTRODUCTORY LETTER TO THE BOD

Date

**Dr. Full Name,
Secretary or Board Member of Northern California Angle Society**

Dear **First Name**:

I would like to propose **Dr. Name and address** as a prospective Affiliate member to the Edward H. Angle Northern California Orthodontic Society. He/she has practiced orthodontics in **city** since **year**. **Name** has attended the required two meetings and is interested in becoming a member. I have known **name** for approximately **n#** years. Attached is his/her Curriculum Vitae. **Co-sponsor name** said that he/she would be very pleased to be a co-sponsor for **Name**.

Sincerely,
Sponsoring Member Full Name

Attachment #2

Policy Regarding Guests

Immediately following the attendance of a component meeting by a guest orthodontist (invited by a current member), the following letter is mailed to the guest by the Secretary of the Edward H. Angle Northern California Orthodontic Society on behalf of the Membership Chair. Once the letter has been sent out, that guest shall be reinvited by a member one more time leading to a case presentation and Affiliate membership. (Two times are paid by the Component). The purpose is to demonstrate the Component's interest in the guest orthodontist and help initiate a path towards membership. Notices of future meetings should also be sent to the guest by the program chair in which the secretary has provided contact information such as email address to include in the mailing list.

Month Day Year

Dr. ---- -----

Address

City, State ZIP

Re: Angle Meeting

Dear Dr. ----,

On behalf of the Northern California component of the Edward H. Angle Society of Orthodontists, we hope you enjoyed your time spent at the last component meeting. You were invited to attend our Angle Society component meeting because you are highly regarded in your profession and your community.

As you may already know, the Angle Society is a unique organization of women and men who uphold a high level of integrity and are passionate about their profession, sharing goals of challenging themselves towards professional excellence. You may recognize several members who are also prominent in the academic and orthodontic community. The friendships and camaraderie formed in the Angle Society are lifetime.

Enclosed, you will find our Membership manual describing the requirements for membership. Should you have an interest in the Angle Society, please contact your meeting host, myself, or any member to explore how the Society may enrich your career. Our sincere interest is in the success of our members.

Sincerely,

Secretary, Northern California Component
Edward H. Angle Orthodontic Society



Angle Northern California

CANDIDATE/GUEST INFORMATION FORM
(TO BE COMPLETED BY PRIMARY SPONSOR)

- 1. Doctor's Name (First) (Middle) (Last)
2. Office Address (Street) Phone Fax (City) (State) (Zip)
3. Home Address (Street) (City) (State) (Zip) E-mail
4. Sponsor(s) Primary: Secondary:
5. Organized Dentistry Affiliations: American Dental Association YES NO American Association of Orthodontists YES NO Constituent Society Local Society
6. Dental School Degree Date Conferred
7. Ortho Education Degree Date Conferred
8. The Guest/Candidate is primarily involved in: Clinical Practice Education/Research
9. Other Angle members acquainted with the Guest Candidate
10. Has the Guest/Candidate completed the Phase II (Written Exam) of the American Board of Orthodontics? Yes NO Has the Guest/candidate completed the Phase III of the American Board of Orthodontics? Yes No
11. Has any State Licensure Agency ever instituted a disciplinary action against this individual? Yes No (If yes please explain on an additional sheet)
12. Using the reverse side please provide the following: a. Guest/Candidate clinical and/or teaching skills.

Please return to: Dr. Patricia Choi
Secretary, Angle Northern California
By email: drchoi@choiortho.com
2111 Parkside Dr., Suite A
Fremont, CA 94536

Edward H. Northern California Orthodontic Society

Officers of 2021- 2023

President – Ann Marie Gorczyca
President Elect – Thomas Marcel
Secretary – Patricia Sing Choi
Treasurer – Robert Kelleher
Immediate Past President – Paul Kasrovi

Directors

One Year Term –Rebecca Keller
Two Year Term – Kiyoshi Tai
Three Year Term – Snehlata Oberoi
Four Year Term – Bella Shen Garnett
Five Year Term – Lili Horton
Northern California Director to the EHASO – Jae Park

Committee Members

Angle Newsletter Editor/Photographer: Lili Horton

Policy, Procedures, Bylaws Committee: Ann Marie Gorczyca - Chair,
Ron Champion, Patricia Choi

Clinical Evaluation Committee: Greg Wadden-Chair, Steve Dugoni, John
Gibbs, Ken Kai, Rebecca Keller, Patricia Choi

Equipment Committee: Joorok Park-Chair, Brian Payne, Tom Marcel

Hospitality Committee: Bella Shen Garnett-Chair, Marta Baird

Membership Committee: Lili Horton-Chair, Greg Wadden, Heesoo Oh

Nominating Committee: Paul Kasrovi-Chair, Brian Payne, Greg Wadden

Thesis Committee: Hee Soo Oh, Jae Park, Snehlata Oberoi