

**NORTHERN CALIFORNIA
EDWARD H. ANGLE SOCIETY OF ORTHODONTISTS
POLICY AND PROCEDURE MANUAL**

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I. INTRODUCTION

The purpose of this manual is to define the policies and procedures of the Northern California Edward Angle Society of Orthodontists (NorCal EHASO) 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 NorCal EHASO 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: Sturgis Standard Code of Parliamentary Procedure shall govern the Component deliberations and meetings.

Component Banking: The official NorCal EHASO 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 \$5000. 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. Among them are Executive, Bylaws, Clinical Evaluation, Equipment, Membership, Nominating, Policy and Procedure, and Thesis Evaluation. The President shall have the authority to appoint Ad Hoc committees when the need arises and dissolve them similarly.

Guests: The NorCal EHASO 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 Information Form (Attachment #1) must be submitted for all guests except residents. See also the Policy Regarding Guest/Guest Fees (Attachment #2) and the Member's Sample Introductory Letter to the BOD (Attachment #3).

Use of Mailing Lists/Roster: Use of the mailing lists or roster of NorCal EHASO 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 NorCal EHASO 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 makes periodic reports to the Board of Directors and the membership regarding the President's evaluation of the status and vision of the NorCal EHASO. 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 along with the Secretary shall establish the agenda for the upcoming BOD meeting. The President generally conducts the BOD meeting at 8:00-9:00am 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 9:00am, the President may call the BOD back into session at a later time. The BOD has final say in matters requiring a definitive resolution.

Meetings are held at a convenient location approved by the Board of Directors. There are normally four 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, oversee parliamentary procedure in all conduction of business, etc.

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. 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 also the Program Chair of the Component and as such, is responsible for establishing the program for each NorCal EHASO meeting and making all necessary arrangements with speakers, the selected 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. This 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 four meetings in a calendar year as follows: January/early February, April, June or September, and early November. In years when the EHASO conducts the biennial meeting, our fall meeting usually is not held. The Program Chair is responsible for overseeing the printing of the meeting brochure by the Secretary.

The Program Chair must correspond with the speakers to:

- a) Solicit the speaker to present
- b) Confirm their speaking engagement (8 weeks before the meeting)
- c) Assist with any unusual lodging and/or flight arrangements
- d) Secure a title, CV and photo in time for inclusion in the printed meeting flyer
(minimum 4-5 weeks before meeting)
- e) Ensure that the speaker understands the honorarium, if any, and share that information with the Treasurer.

The Program Chair will use the following as guidelines for speaker honorariums: NorCal EHASO 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 NorCal EHASO, who give a presentation of 3 hours or more, will receive up to \$750 plus travel and lodging. Non-members who give a presentation of 3 hours or more will receive up to \$1000 plus travel and lodging. Normally non-member presentations at \$1000 are limited to one time per year, but under unusual circumstances, the Program Chair may propose to the BOD a different arrangement.

General meeting responsibilities:

- a. Mail program brochure a minimum of three weeks in advance of the meeting using the current membership list. The Program Chair will also be responsible to send the program brochure to all potential new Affiliate members for future meetings. Program brochures 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 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 NorCal EHASO, the Secretary may serve in this capacity for multiple years without progression to the Presidency.

General responsibilities of Secretary:

1. All correspondence (as developed from the Board meetings, assigned by the President, prospective member post meeting letter (attachment #4 P and P Manual), processing new members, etc), 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. Also, keep a copy of the EHASO and the Component Bylaws.
4. Update membership roster annually (have update cards sent with November/December's program announcement) and have roster printed and distributed.
5. Maintain CE provider status with Board of Dental Examiners (forms are sent by them bi-annually around November). Prepare CE slips for each scientific meeting. (60 should be adequate).
6. Prepare membership certificates for new Active Members (calligraphy).
7. Obtain plaque for outgoing President 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. Update Article 12 of the Policy and Procedure Manual as changes occur.
11. Keep a copy of the original Articles of Incorporation and current copies of the Bylaws and Policy and Procedure Manual.

Board of Director's meeting responsibilities:

1. About ten (10) days 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. Agenda for the upcoming meeting.
 - c. CV's and any other pertinent information on proposed new members.
 - d. Any correspondence received that may require board action.
2. Transcribe minutes of the BOD meeting (a tape recorder is invaluable).
3. Bring the following to each meeting:
 - a. Extra copies of 1a-d, above.
 - b. Name tags, attendance sheets (and clip board), CE slips.
 - c. Reference materials: Bylaws, Minutes file, Correspondence file, Current Roster, Attendance log.
 - d. Angle Society seal embossed speaker certificates.

Contacts:

EHASO Association Manager
Nick Dormer
Association Management Services
810 East 10th Street
Lawrence, KS 66044
ndormer@allenpress.com
(800) 627-0326, x215
(785) 843-1234, x215
(785) 843-1274 Fax

Treasurer:

The Treasurer is responsible for maintaining all of the financial records for the NorCal EHASO and estimates the budget for the coming year in conjunction with the other Board members, specifically the Program Chair. 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 EHASO 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. Close coordination with the Secretary is necessary to maintain a current list of Active, Senior Active and Senior Retired members so that billing can be accurate. A separate budget and assessment is often necessary for special programs, joint meetings with other components, or EHASO meetings.

Money is deposited to a NorCal EHASO account in a bank convenient to the Treasurer. If possible, 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/or President-Elect as signers as well as the Treasurer. Only one (1) signature is required for writing checks or withdrawing funds up to \$5000. Checks or the withdrawing of funds above that amount will require two (2) signatures. The Treasurer pays all expenses out of the Angle checking account.

Expenses include meeting costs (speaker honorariums, room rental, food, etc.), Directors/Officers liability insurance, licenses, 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. 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. 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 (NorCal EHASO) to the Board of Directors of the EHASO. 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 NorCal EHASO. 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 NorCal EHASO. 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 NorCal EHASO currently consists of the President, President-elect, Secretary, Treasurer, NorCal EHASO 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 BOD meetings are held at 8:00-9:00 AM prior to the scientific session. If necessary to finish Component business, the Board may recess and reconvene later in the day 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 NorCal EHASO. 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 a Chair and two members appointed by the President 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 NorCal EHASO. 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, 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 NorCal EHASO 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 up coming meeting and shall immediately send each guest an e-mail welcoming them to the Nor Cal EHASO 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 these guest application forms to be available 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 introduce guests to individual Angle members, discuss requirements for membership with the guest, and sit with the guest and host during lunch. The host will introduce the guest at the formal 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, members should contact the Secretary by written communication with their desires and not the Membership Chair (see Attachments #1, 2, and 3).

The Membership Chair serves as the Membership Committee in the NorCal EHASO. 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. (See Attachments Articles 2 thru 7)

During the period while the Affiliate member is completing Active membership requirements the Membership Chair has ongoing responsibilities. Several weeks prior to the quarterly meeting of the Board, 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 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 comprised 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 one or two members who are all 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:

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. Such committees shall have authority to investigate issues and recommend policy within the limited confines of the issue addressed specifically by the Ad Hoc committee in question. These committees are appointed by the President, who also has the authority to dissolve the committee upon the completion of its task.



Angle Northern California

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

___ Guest
___ Candidate
(Non-U.S. Trained individuals must come as a Guest
the first year)

- 1. Doctor's Name (First, Middle, Last) Meeting Date
2. Office Address (Street, City, State, Zip) Phone, Fax
3. Home Address (Street, City, State, Zip, Country) e-mail
4. Sponsor(s) Primary, Secondary
5. Organized Dentistry Affiliations: American Dental Association, American Association of Orthodontists, 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
11. Has any State Licensure Agency ever instituted a disciplinary action against this individual? Yes/No
12. To the sponsor: Using reverse side please provide the following: a. Guest/Candidate clinical and/or teaching skills. b. Assessment regarding the individual.

Please Return to: Dr. Maryse Aubert (draubert@aol.com)
Secretary, Angle Northern California
1565 Hollenbeck avenue, suite 105
Sunnyvale, CA 94087

DEADLINE IS SEPTEMBER 15th THE YEAR PRECEDING THE 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 longterm 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 that the lunches are hosted by the NorCal EHASO, the Treasurer will bill the inviting member listed for each additional meeting attended by that guest for the amount of \$75 which is 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 \$75 to the sponsoring member of non orthodontist guests such as other medical/dental professionals and member's friends/family including wives on each attendance occasion. It will still be necessary to follow steps 4 and 5 as above. For sites other than the Peninsula 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 NorCal EHASO 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 NorCal EHASO 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.
9. Costs for student guests and faculty from area university residency programs will be absorbed by the NorCal EHASO when the meeting is held at the Dugoni/Pacific Dental School, but not when held at other private venues.

Northern California Society of Orthodontists
MEMBER'S SAMPLE INTRODUCTORY LETTER TO THE BOD

**Dr. Full Name,
Secretary Northern California Angle Society
Address**

Dear **First Name**:

I would like to propose **Dr. Name and address** as a prospective Affiliate member to the Northern California Angle Society of Orthodontists He 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 Curriculum Vitae.
Co-sponsor name said that he would be very pleased to be a co-sponsor for **Name**.

Sincerely,

Your Full Name

Northern California Angle Society of Orthodontists
SECRETARY' S LETTER TO NEW PROSPECTIVE MEMBER

Immediately following the attendance of component meeting by a guest orthodontist (invited by a current member) the following letter is mailed to them by the Secretary of the Northern California Component of the EHASO on behalf of the Membership Chair. Once the letter has been sent out, that invitee or guest shall be re-invited by a member 2-3 more times 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 Secretary.

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. Obviously, you are highly regarded in your profession and your community because of your invitation by a component member to attend a meeting.

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 community. The friendships and camaraderie formed are lifetime.

Enclosed, you will find a pamphlet 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 Society of Orthodontists

CHECKLIST FOR DISCUSSER

I. THE RESEARCH PROBLEM

A. Is there a statement of the problem and is it adequate?

1. Is the problem clearly, accurately, and completely described?
2. Are the components of the problem described in enough detail to permit judgment on the appropriateness of the direction taken by the researcher?
3. Are purposes of the study clearly stated?

A good manuscript will give the discussor a clear and detailed description of the research problem that has been studied. The statement of the problem can be used as a “road map” for reading the remainder of the manuscript and as a basis for judging how well the study accomplished its purposes. If the statement of the problem is missing, severely abbreviated or vague, the remainder of the report should be more carefully scrutinized.

B. Is the review of the literature adequate?

1. Has a thorough review of the literature relating to the problem been made?
2. Have the studies cited been evaluated in regard to their validity?
3. Have earlier studies been described in enough detail to show that existing evidence does not solve the problem?

Progress in science requires that each investigator build upon what is already known. The trustworthy manuscript will include a critical, thorough and impartial review of previously related studies to enable the reader to better judge the validity and importance of the study. On the other hand, an author who is trying to convince the reader of the value of some product or point of view is not likely to present a balanced review of related studies. It is usually fairly easy to spot such a report by the absence of any negative findings or contraindications among the references.

C. Are important terms defined?

1. Are important terms and concepts adequately defined?
2. In the body of the report, are these terms and concepts actually used as defined?

If important terms and concepts are not carefully defined and appropriately used, it may be impossible to be sure what the author really studied. Vague and general terms need defining and the carefully written manuscript will include such definitions.

D. Are the hypotheses or objectives adequate?

1. Are the hypotheses or objectives stated clearly enough to judge whether they can be tested or achieved?
2. If the hypotheses or objectives are not clear, can they be restated clearly enough to judge whether they can be tested or achieved?
3. Do the hypotheses or objectives follow directly from the statement of the problem?
4. Are the assumptions on which the hypotheses or objectives are based clearly stated and obviously warranted?

The hypotheses or objectives are the heart of any research project. If they are fuzzy, poorly stated, or do not follow from the statement of the problem, care should be taken to be certain what was really studied.

II. EXPERIMENTAL OR DESCRIPTIVE METHOD

A. What is the population and how is it sampled?

1. What are the characteristics of the population in which the investigator was interested?
2. What are the characteristics of the objects or people included in the sample and how large is the sample?
3. Have any conditions biased selection or assignment of the objects or persons in the sample?

When reviewing research, the clinician should be particularly concerned with the characteristics of the population and sample used in the study.

B. Research Design (for experimental studies only)

1. Has the investigator clearly formulated and described his research design?
2. Has the possibility of hidden factors, other than the experimental variables that might influence the results of the investigation, been considered?

The research design should be meticulously planned and executed to permit firm conclusions. If the research design is not described clearly and in an understandable way, it is a fair bet that the researcher did not formulate the design completely or clearly enough to be valid.

C. Measurement

1. Do the tests and measurements used give reasonable measures of the factors under study?
2. Is evidence presented to show that the test and instruments used give valid and reliable measures of the factors under study?
3. Are the conditions in which the measurements were obtained fully and clearly described?
4. Are all factors or variables listed or implied in the hypotheses or objectives measured?

In all research, measurement is a great importance, but in clinical research, measurement is particularly important. It is often very difficult to develop a reliable and valid measure of many clinical conditions. But often clinical researchers depend on such descriptions as good, fair, poor and bad or clinically pathological and clinically normal or similar category systems when more refined measurements are both necessary and possible. If the measures used are inadequate or if they fail to measure the factors listed in the hypotheses or objectives, caution must be taken in interpreting and using the results of the study.

III. RESULTS OF THE STUDY

A. Data analysis

1. Are all factors that are needed to test the hypotheses or achieve the objectives included in the analysis?
2. Where statistical tests of significance are used, are these tests described, or at least named?
3. Are the hypotheses, in fact, tested? Are the objectives of the study achieved?
4. Where the author claims significant differences, are the differences large enough to make any difference in clinical practice?

Depending on the training in statistical methods, the discussor may expect some difficulty in reviewing the data analysis of the study. However, two very important and informative actions can be taken regardless of the background in statistics: 1) Look at the hypotheses or objectives in relation to the data presented to be sure that the author has, in fact, tested the hypotheses or achieved the objectives listed. 2) If statistically significant differences are reported, look at the data to determine if the differences are large enough to be clinically important.

B. Presentation of findings

1. Are the data presented in a straightforward, clear manner suggesting that the author has done a careful job in analysis and presentation?
2. Are the purposes and contents of the summary statistical tables clear?

The presentation of findings section is a good index of the care taken by the author in his research. It is all too frequent that the presentation of findings is muddled and tables are unclear. If this section is not understandable, conclusions given at the end of the article should not be accepted without very close scrutiny.

IV. DISCUSSION AND CONCLUSIONS

A. Discussion

1. Does the discussion follow directly from the results of the study?
2. Are generalizations of the results limited to the population and conditions of the study?

When findings and discussion are not closely related, the discussor should be aware of personal or professional biases.

B. Conclusions

1. Are the conclusions warranted by the findings?
2. Are the conclusions relevant to the situation to which you might wish to apply them?

If the findings of a study are pertinent to a clinical situation, the conclusions should be very carefully scrutinized in terms of the population used, the research methods utilized, and the practical circumstances in which the study was done. Comparison should be made between the data reported in the results section and the conclusions to be sure that they agree.

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