

1 **Resolution Number:** 403-2025

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3 **Title:** Amendment to the Standing Rules of the House of Delegates, Section 3. Order and
4 Schedule of Business

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6 **Reference Committee Assignment:** Professional Issues and Governance

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8 **Sponsor(s):** 2024-25 Financial Reporting Team

9 Tareina Rogers, Vice President, Executive Committee Member

10 Jake Cantrell, District 1 Trustee

11 Gautam Rangappa, Chapter President, El Paso '26

12 Megan Kalpin, Chapter President, Texas-San Antonio '26

13 Jared Jacobson, Chapter President, Boston '25

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15 **Financial Impact:** None

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17 **Board of Trustees Comments:** The Board recommends a yes vote.

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19 **Reference Committee Comments:**

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21 **Background:** In response to resolutions 204-2024, the 2024-25 Board of Trustees appointed a
22 team to research financial information that should be shared with House of Delegates
23 members based on their role by reviewing association best practices and financial reporting
24 conducted by other dental associations.

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26 A survey requesting the level of financial information shared with house of delegates was sent
27 to the following dental associations:

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- American Dental Association

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- Academy of General Dentistry

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- All 12 ADA recognized dental specialties including:

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- American Academy of Oral & Maxillofacial Radiology

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- American College of Prosthodontists

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- American Society of Dentist Anesthesiologists

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- American Academy of Periodontology

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- American Association of Endodontists

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- American Academy of Oral Medicine

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- American Academy of Oral & Maxillofacial Pathology

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- American Association of Public Health Dentistry

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- American Academy of Pediatric Dentistry

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- American Association of Oral and Maxillofacial Surgeons

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- American Association of Orthodontists

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- American Academy of Orofacial Pain

43 Given the extensive number of associations in the field of dentistry, parameters were set to
44 narrow the focus to the two largest dental associations, the ADA and AGD and to those
45 specialties recognized by the ADA. We also included the only other stand-alone student
46 dental association, SNDA.

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48 Below are the responses received:

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50 Below is a summary of the survey results

- 51 ● 10 of the 15 associations responded to the survey.
- 52 ● 2 associations sent financial information before the meeting.
- 53 ● All associations share some type of financial report at their house or general assembly.
 - 54 ○ The majority of associations share a summary of revenue and expense by
 - 55 category for the year using pie charts. 2 associations provide only verbal
 - 56 summary reports.
 - 57 ○ 2 associations share an audited financial report and a profit and loss statement
 - 58 with a comparison to the prior year.
- 59 ● 6 associations allow questions, but 4 noted they are on a tight schedule. The 4
- 60 associations have a separate session for those interested in more detailed financial
- 61 information.

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63 The team has fulfilled its directive and no further action is required; therefore, be it

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65 **RESOLUTION**

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67 **Resolved**, that the Standing Rules of the House of Delegates, Section 3 Schedule and Order of
68 Business be amended as follows:

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70 The speaker and secretary of the House of Delegates (executive director) are responsible for
71 the day-to-day business of the House, including the order of business, the agenda and the
72 sequencing of resolutions. The House of Delegates business meeting schedule is determined by
73 the Committee on Sessions, but may be subject to change. Under extenuating circumstances,
74 additional meetings of the House of Delegates during an Annual Session may be called by
75 majority vote of the House.

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77 The business meeting schedule should include a financial presentation and discussion and
78 distribution of materials as noted below to ensure greater transparency and accountability in
79 ASDA's financial matters, allowing delegates to review financial materials, ask questions, seek
80 clarification, and engage in discussions to promote informed decision-making and oversight.

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82 **A. Distribution of Financial Report Materials**

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84 Materials regarding the financial report shall be distributed to credentialed delegates
85 via email at least two weeks before the first day of the annual session.

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B. Detailed Financial Reporting Requirements for Financial Presentation

The financial report presented at the Annual Session must include the following information in numerical value, percentage, year-to-year percentage change:

- a) Total membership and past and projected trends
- b) Revenues in total and by category
- c) Expenses in total and by category
- d) Financial trends of revenues, expenses, and contribution to net assets over the past 10 years

C. Team

~~The Board of Trustees shall appoint a team consisting of three chapter presidents, one Board member, one current Executive Committee member, and one immediate past EC Member and a staff liaison to research financial information that should be shared with House of Delegates members based on their role by reviewing association best practices and financial reporting conducted by other dental associations.~~

D. Financial Discussion

Following the presentation of the financial report by the Executive Committee, along with the reasons for any updates or corrections, the Speaker of the House shall lead a discussion lasting at least 10 minutes during the second House of Delegates Business Meeting, allowing delegates to ask questions, seek clarification, voice any concerns regarding the provided financial material, and receive timely responses from the Executive Committee or staff during such session. The duration of this session can be extended or concluded by a simple majority vote called by a House delegate.

E. Formal Requests for Additional Financial Items

During financial report presentation and discussion session, delegates may formally request additional financial items by amending this section of the Standing Rules of the House of Delegates through a supermajority three-quarters vote called by a House delegate. The requested financial items must be documented by the secretary of the House of Delegates and included in the following year's financial report presentation and materials provided to House delegates.

Action: