



CSDA Membership Affinity Program Guide for Potential Applicants

Introduction

Thank you for your inquiry about an endorsement from the Connecticut State Dental Association. The CSDA is a statewide professional membership association for dentists and their staff. We are a constituent state society of the American Dental Association and work together with our twenty-two local component societies throughout Connecticut to protect the interests of our members, their patients, and the oral health care community.

As a professional membership association our first responsibility is to our members. We want to ensure that our members are completely satisfied with the work we do on their behalf. Naturally, this also extends to any products or services our members may receive from other companies that work in conjunction with the CSDA. Therefore, we must be highly selective when it comes to granting requests for an endorsement by our organization.

This document has been developed to educate interested parties on our association, the expectations we have for those businesses we endorse, and the access we can provide to our members. Since we receive many inquiries from companies that wish to offer a product or service to our members, we have established a formal review process to ensure that our endorsements will enhance the value proposition we offer to our members. If you are interested in participating in our Membership Affinity Program, please review the information in this document and respond in writing to the questions listed on page 8.

Background Information on the Connecticut State Dental Association

The CSDA was established in 1864 to help dentists provide the highest quality oral health care to their patients. As a professional association we are engaged in a wide range of activities on behalf of our members including the following:

Professional Development: Each year we recruit nationally recognized speakers from across the country and bring them to Connecticut to educate our members on the latest scientific research, clinical procedures, and practice management issues.

Legislative Advocacy: The CSDA educates policy makers on oral health care issues and works closely with a number of state agencies including the Department of Public Health and the Department of Social Services.

Annual Meeting and Trade Show: Over 2,000 dental professionals from across the region attend our Annual Meeting. Each year we offer over 50 courses during the conference and our trade show features 132 exhibits from a variety of vendors.

Promoting Oral Health Care: The CSDA disseminates information on a wide range of oral health care topics to our members and the general public.

Insurance Programs: We provide our members with access to a wide range of insurance and retirement programs for dentists, their families, and staff.

Communications: The CSDA disseminates news and information to our members through our website, bi-weekly e-newsletter, quarterly news magazine, periodic direct mailings, and other channels of communication.

Membership Profile

We have approximately 2,300 members. The following are some key statistics about our key membership categories:

Active Licensed Members: The CSDA has 1,617 members who are licensed and actively practicing dentistry within Connecticut. This represents 69% of the total market share of those in Connecticut who could fall within this category. In comparison, the American Dental Association's total market share for licensed and actively practicing dentists across the county is 63%.

These active licensed members include 1,186 general practitioners (66% market share) and 490 are specialists (78% market share).

Retired Members: The CSDA also has 590 retired members who are not currently practicing dentistry. These members continue to maintain their membership in our association in order to preserve their access to critical membership benefits and remain connected to the oral health care community. This demographic may be especially appealing to those businesses that are marketing products or services for personal rather than professional use.

We also have additional members in various smaller categories including graduate students, dentists practicing out of state, etc.

Membership Affinity Program

Businesses seeking to market their products or services to dentists and other oral health care professionals often turn to the CSDA for assistance. As a result our association offers advertising space in our publications, sponsorship of CSDA events, banner advertisements on our website, and other marketing opportunities. However, if a business is looking for that extra edge that will make their advertising stand out and draw interest from the dental community, they may seek our endorsement of their product or service.

We have established the Membership Affinity Program to carefully review any requests from businesses seeking our endorsement of their product or service. Our members place a great deal of trust in our association. While we are interested in leveraging the buying power of our members in order to assist them in obtaining access to significant discounts, we also want to preserve the trust and good will we have with our members. Therefore, we only want to work with businesses that share our high standards and who can satisfy our members' needs.

The goal for this program is to help create a win-win situation in which endorsed businesses profit from the volume of sales to the oral health care community while our members receive

discounted prices on quality products and services. We also wish to develop this program as a source of non-dues revenue so that we can continue to strengthen our association and better serve our members.

Parameters of Endorsement

The CSDA has developed specific parameters for the types of proposals that will be considered for inclusion in the Membership Affinity Program. Products and services that are clinical or scientific in nature, including dental equipment, are not eligible for this program. We will also not consider anything that may be duplicative of the benefits we provide to our members. This includes, but is not limited to, continuing education courses, insurance, or investment products. Businesses interested in offering the latter should contact the appropriate CSDA staff person to obtain information about how we select any outside vendors we may use to help us deliver these programs to our members.

What We Look For When Reviewing a Proposal

The CSDA will only consider proposals that have all of the following attributes:

Experience with the Oral Health Care Community: We are looking for firms that have prior experience serving the needs of the oral health care community. Endorsements or recommendations from dental societies in other states are preferred but not required.

Membership Benefit: The product or service must either help dental practices operate smoothly and efficiently, or deliver exceptional personal value to dentists and their staff members.

Demonstrated Need: There must be a clear and proven need for this product or service among a significant portion of our members.

Unique Member Offer: The product or service offered to our members must be more attractive than what they can find on their own in the general marketplace. We have a strong preference for discounted “members only” pricing that reinforces the value of membership in our association. However, in very limited circumstances we may also consider exceptional proposals that offer our members enhanced, personalized services that are unavailable to other customers.

Requirements for Endorsement

Responsive Customer Service

Our members hold us to the highest standards and expect us to act on their behalf. They will not hesitate to voice their opinions if they are dissatisfied with a product or service. In the event that our members are dissatisfied with a CSDA endorsed product or service, they may demand that we become involved in the dispute. Our success as a membership association depends upon our ability to respond to our members’ needs and assist them in resolving these disputes to their

satisfaction. Therefore, we expect firms to be very responsive to our needs and the complaints of our members.

Any dissatisfied members must be treated seriously and responded to in a timely manner. Firms participating in our Membership Affinity Program are expected to maintain a sufficient number of trained customer service representatives to handle the business generated by our members. If the CSDA is contacted about a situation, we will expect that a senior management official with decision-making authority will respond quickly to any inquiries we may have. We also expect that all reasonable complaints from our members will be resolved to our members' satisfaction.

Financial Costs

The CSDA is open to considering various options for compensating our association for the support we will provide to an endorsed product or service. However, we will require a minimum annual revenue guarantee in the event that the proposed compensation is based on royalties from sales or other variable payment models.

Marketing Commitment

Endorsed companies are expected to actively market their services directly to our members. While we will promote our Membership Affinity Program to our members, these efforts are designed to complement rather than substitute for each participant's own marketing campaign. Endorsed businesses are required to submit an annual marketing plan that outlines the steps they will take to market their products or services to our members. This plan should outline the businesses' own outside marketing activities and detail their plans for using CSDA resources (i.e. our mailing lists, advertising space in our magazine, attendance at CSDA events, etc.) to reach our members. While there is no minimum marketing investment required, we expect endorsed companies to take advantage of the opportunities we provide to help them reach our members.

Participating businesses are also required to submit a proof of all marketing materials including, without limitation, advertisements in publications, postcards, brochures, flyers, banner ads, or emails that reference our endorsement or that are distributed to our members. The CSDA must be provided with a reasonable amount of time to review and approve these materials prior to their distribution. These steps will allow us to ensure that our members do not receive any objectionable materials and that our name or logo is used in a manner consistent with the agreement between our organizations.

The CSDA also requests that each endorsed company identify an experienced relationship manager to serve as the primary liaison with the CSDA. The relationship manager shall be available to discuss and address any concerns we may have regarding specific advertising pieces, operational issues, and customer service complaints.

Reports and Records

The CSDA requires that endorsed businesses submit an annual report that details the number of new or renewing customers they have from within our membership. This type of data is essential to measuring the success of our program and for our own efforts to promote endorsed products or services.

Contractual Requirements

It is important to note that the CSDA has several contractual requirements with regard to the agreements that we negotiate for our Affinity Membership Program. The following is a list of these contractual requirements:

Connecticut Law and Venue: We will require that the contracts we sign stipulate that the agreement shall be interpreted in accordance with Connecticut law and that any cause of action arising under the contract must be filed in a Connecticut court.

Copyrights and Trademarks: Endorsed firms will be given a license to use our association's name and logo in their advertisements. Therefore, we will require specific language be used in the agreement to protect our ownership interest in these assets. In the event that the agreement is terminated at a later date, we will also require that all existing marketing materials with our name or logo, or that indicate our previous endorsement, be returned to the CSDA for destruction.

Review of Marketing Materials: We reserve the right to review and approve all marketing materials that reference our endorsement or that are distributed to our members. We will do not unreasonably withhold our approval but will seek to avoid any potential backlash against advertisements that our members may find objectionable or that may misrepresent the intent of our endorsement.

Set Contract Terms: We require that all agreements have a set contract term and will not accept any automatic renewal language in the contract.

The Benefits of Participating in our Membership Affinity Program

The following are a few examples of what companies can expect to receive when they become a part of the CSDA Membership Affinity Program.

CSDA's Endorsement

Those businesses that satisfy our high standards and accept the conditions of our Membership Affinity Program will receive the CSDA's endorsement. Endorsed business will receive a license to use the CSDA's logo in their advertisements. They will also be permitted to reference our endorsement in their marketing materials.

Membership Lists

Endorsed companies will have access to our membership mailing lists. The CSDA will provide a complimentary mailing list for the firms use in a direct mail marketing campaign to our members. Each participating firm may request an updated membership list every six months during the term of their agreement with the CSDA. The CSDA also offers enhanced services to endorsed business that can provide them with access to mailing lists that are segmented by membership type, specialty, age, or other demographic criteria that is tracked within our membership database.

General Advertising Opportunities

The CSDA currently offers businesses a number of options for marketing their products and services to our members. However, businesses which participate in our endorsement program will be given the first opportunity to secure the following advertising opportunities as they become available (i.e. existing contracts or agreements expire with non-endorsed firms):

Advertisements in Association Publications: The CSDA offers advertising space in our quarterly new magazine, bi-weekly e-newsletter, website, and annual convention program.

Sponsorship and Booth Space: Businesses may officially sponsor our events. We also rent booth space at some of our events including the CSDA Annual Meeting, Package Program Series, and the New Dentist Outreach Events.

The CSDA is also open to negotiating contractual requirements which guarantee the endorsed business specific advertising opportunities that are identified within any final agreement between our organizations.

Exclusive Advertising Opportunities

The CSDA has also reserved specific advertising opportunities for the promotion of our Membership Affinity Program including the following:

New Membership Packets: All new and prospective members receive an informational package that describes our association, our services, and the benefits of membership. Firms that participate in the Membership Affinity Program will be identified on an insert that promotes our endorsement program. Endorsed firms may also supply the association with specific marketing materials (flyers, brochures, etc.) to be included within this promotional package.

Website Placement and Links: The CSDA hosts a special page on our website to promote firms that participate in our Membership Affinity Program. This page will include a write-up that briefly identifies each endorsed product or service along with the special discounts or enhanced services that are available to CSDA members. We will also include a link from our website to any website or specific landing page identified by the endorsed firm for the placement of online orders.

Distribution at CSDA Events: The CSDA will distribution information on our Membership Affinity Program at all CSDA events. Endorsed firms may also supply the association with specific marketing pieces (flyers, brochures, etc.) that can be made available to members attending these events.

Proposal Review Process

The following are the steps we follow when reviewing an application to join our membership affinity program:

Answering the Questionnaire: Our review process starts when a firm completes the questionnaire found on page 8 of this document and submits it to our association along with other background information on their product or service.

Screening the Proposals: These materials will be emailed to the CSDA Membership Affinity Committee for their review. If two of the five committee members indicate that the firm may be a fit for our program, our staff will contact the firm to schedule a meeting with the committee.

Committee Presentation: During this stage of our process, representatives from the firm make a presentation directly to the committee. If a majority of the committee is satisfied with a proposal, they will recommend that our Board of Governors authorize staff to negotiate an endorsement agreement with the firm.

Further Research: In some cases the CSDA Membership Affinity Committee may conduct additional research before reaching a decision on a specific proposal. This may include instructing staff to obtain additional information from the firm or gather information from our members about the vendors they currently utilize.

Board Approval: The Board of Governors will review a confidential report from the Membership Affinity Committee on the firm's proposal. In the event they approve the committee's recommendation, the Board will issue negotiating instructions to our staff.

Contract Negotiation: CSDA staff will negotiate an agreement with the applicant pursuant to instructions that are issued by the Board of Governors. Upon the successful completion of these negotiations, the applicant's firm will join our membership affinity program.

Application Process

If your business is willing to accept the requirements of our Membership Affinity Program and you believe you can satisfy our high standards, please answer the following questions in writing. Please provide as much detail as possible. This information will be provided to our Membership Affinity Task Force as they conduct a preliminary review of your proposal. A CSDA representative will follow up with you within a week of the receipt of your answers to the following questions.

1. How long has your company been in business and how long have they offered the proposed product or service?
2. How many employees does your firm have? How many customer service representatives do you have available to handle inbound and outbound calls? Are these customer service representatives in house or outsourced?
3. Please provide information on the oral health care professionals who are currently using your product or service. We are specifically interested in information regarding the number of dental customers, number of dental sales, average dental sales, etc.
4. Can you provide references from anyone within the oral health care community who currently uses your product or service? If so, please provide their names and contact information.
5. Do you participate in any Membership Affinity Programs with other dental societies or membership organizations? If so, please list the names of all these organizations.
6. Please indicate specifically why you feel there is a need for your product or service among our members.
7. What steps do you take currently to market your product or service to the oral health care community? If you are accepted into this program, will you be advertising in any of our publications or renting booth space at our events?
8. What special pricing or enhanced features are you offering to our members through this program and how does this compare to what they can currently get on their own?
9. How is your company offering to compensate the CSDA for the support we will provide to your business? Please include details regarding the model of compensation you are offering and the amounts (both fixed and variable) that would be received by the CSDA.
10. Does your company have any specific conditions or requirements that would be part of any final agreement between our organizations? If so, please specify.

Name of Firm: _____

Name of Contact Person: _____

Telephone Number: _____ Email: _____