



IFDH Executive Director Report To the Board of Directors & House of Delegates June, 2016

Thank you to everyone that all of our staff has worked with over the last 3 years – board members and all members from around the world. I appreciate the commitment of the current Board of Directors which has been a very cohesive unit discussing all issues while always coming to a unanimous consensus on ways to improve the organization.

I especially would like to thank our President JoAnn Gurenlian who was a pleasure to have worked with on a weekly basis on every single IFDH issue since day one – many, many, long phone calls and emails to discuss situations, to explain how all aspects of IFDH works, and to discuss new ways to generate new income for the organization. You should all be proud of the amount of time she has given to IFDH over the past three years.

I apologize for the length of this report, but it has been three years - new staff, new projects, updated procedures and so much more - that you must be brought up-to-date on.

It is my goal, as the President of my company – Anas Marketing & Management – and as your Executive Director, to provide our clients with guidance from a “big picture” or strategic perspective, as well as oversight of our staff to ensure that all work is completed on time and on budget.

When we start out with a new client, we understand that during the first year there is a steep learning curve, understanding your systems, as well as the nuances (the way you like things done). But it is my job to assess those systems and from our vast experience with managing other non profit organizations, to suggest new and more professional ways of doing things.

The board knows that they didn’t hire a secretary or only an Executive Director – they hired a staff – each with a professional background in non profit management, including membership, certification, accounting, marketing, publishing, websites, conferences, and much more.

The majority of time with past staff and new staff was to be spent on IFDH basic office management.

Income & Programs Sponsorship

But once we got involved, we saw that income was stagnant and basically no corporate sponsorship income whatsoever. At this point, I started educating the board to think of new projects that, not only could be useful to the membership, but would be intriguing enough to lure companies to underwrite or sponsor. But this doesn’t happen overnight. This takes time. Time to develop the concept, time to flush out the details and time to contact the sponsors, for each project.

The entire board started developing new programs and partnership ideas. This was followed by us writing and publishing a Corporate Sponsor Prospectus brochure. Then, I was

given the task to contact every name that the board provided. We met with several, either in the US, or at EuroPerio in London.

After contacting over 30 companies and 60 individuals, we found out that they ALL thought that their funding of the ISDH symposium meant that those funds came to IFDH – the organization. We had to explain to them that this was not the case.

New Program Development

I worked with the board by helping to develop new program concepts and their implementation details. These programs included:

- Every Child Has a Toothbrush
- Text2Floss
- Social Responsibility Awards
- Social Responsibility Workshop and Conference
- Research Grant Program
- Worldwide Survey & White Paper on International Trends in Oral Hygiene

Five of these six programs are currently in progress. The final is ready to be pitched for sponsorship.

Internal Procedures

Upon an initial review of the internal procedures, files and forms, one by one, when they were transferred to us in September 2013, we started to see that the majority of documents required updating and/or improvement in one way or another.

After 2 ½ years of updating all document and developing forms and procedures for new programs, we worked with the Infrastructure Committee this past year to assess and improve the existing Procedures document. Once we reviewed and discussed the details of the document, I suggested that much of the information presented is already in the Bylaws and there is no need to be repetitive. So what the staff did, was to describe every internal procedure and present every form that is used in IFDH. This evolved into an 83-page document. This took a few months to prepare and it is mainly for the use of our staff, with oversight of the board and members.

Incorporation & Non Profit Status

In addition to the basic items mentioned above, we were also thrust into the lengthy and detailed area of applying for non profit status, first in Switzerland and then in the United States. As most of you saw in 2014 and 2015, much was involved, first in applying for incorporation in the state of Maryland. The next step was to work with the board and attorney on adjusting the existing bylaws to US standards and rules. This was followed by filing for non profit status and filling out all required forms with the US Federal Government. I was the main point person in consulting with the attorney to ensure that all stages and individual elements and forms were completed correctly.

This was not something we were contracted to do, but we did not charge IFDH for this additional service.

Membership

Database: The membership information that we inherited was spread over multiple files which made it time consuming to find all information related to one member. We combined all membership information into one comprehensive membership database. Now,

we can access contact, payment and delegate information at a glance. As a result, dues billing and collection is streamlined and efficient which allows us to provide detailed monthly membership status and activity reports to the staff and board. The database also allows us to create sub-databases for special projects like Every Child Has a Toothbrush.

Invoices: Before September 2013, dues invoices listed two payment options and were two pages long. We changed the layout and added “check/money order” as a payment option. In addition, we created a space for members to update contact information. Although more information was added to the invoice, we were able to provide all information on one page with a user-friendly layout. The layout is used for all invoices (sponsor, membership dues).

Member Communication: We have updated the Association Member welcome letter to include the current activities of IFDH which we update as needed. The welcome letter sent to individual members has been updated as well.

Membership Applications: We updated the membership application for all member categories to include detailed payment options with banking information. In addition, member applications for new member categories were created. Thank you to Adele Shevach, Membership Chair for her help with new member applications.

Finances, Banking, Budget, Accounting

Banking: We started the accounting process by presenting our situation to several banks to open an account, but many would not accept our account, since at that time, IFDH was not incorporated in the US. This also included the requirement of being able to process credit card payments. We were able to find a national bank that accepted us for all of our needs.

Accounting: We assessed the accounting that we inherited and realized that the way the finances were presented to the delegates in South Africa was ambiguous. The approved budget was actually in a loss situation, but the way it was presented, the loss was not evident. It became apparent that the information provided needed to be restated in more acceptable accounting terms.

We input all the financial numbers from 2013 into our professional accounting software and showed the board the approved loss. This convinced the board for the need for professional monthly accounting services and the need to look at ways of assessing all programs and potential new projects from an income and expense perspective. This was a change from the way IFDH had conducted business in the past.

We receive all invoices and enter this information into the IFDH accounting software. A report is produced and reviewed by the Treasurer and President for approval for payment. We process checks, credit card payments and wire transfers and record the revenue into the accounting system. We have itemized all new projects so that budgets and monthly statements are easy to understand. A monthly bank reconciliation is prepared, followed by a monthly Statement of Revenue & Expense which is provided to the Board. Thank you to Mary Rose Pincelli Boglione for her constant oversight of the IFDH finances.

Tax: Since we were approved by the State of Maryland as an incorporated company in 2014 and by the US Federal Government as a non profit organization in November 2014, our first year of tax submission (IRS Form 990) was for the year 2015. This form has been completed and is available for your review.

Review: As per our bylaws, we are required to do an accounting review by an external accounting firm. This has been completed and shows no irregularities. It is attached with the Treasurer’s report for your review.

I think IFDH has come a long way with the current budget by adding programs which almost double revenues for 2016. And you can see from the type of budget document we prepared for the board, that it is presented properly and easy to understand.

eNewsletter

With my initial assessment of the IFDH printed newsletter, I suggested to the board that a better and quicker way to communicate news and information to our membership and others was by publishing an electronic eNews instead of a printed newsletter. I thank Maria Goldie for her help as Editor in providing all of the content for the Health & Research section. Content for the Members' News and Calendar sections was provided by the members and edited by the staff. The staff provided the content for the IFDH News. We have received many compliments on the quality and quantity of content provided three times annually. And thank you to Colgate for their continued sponsorship.

Website

Over time, we have kept the look of the website that we inherited, but what we did was:

- Add more significance to the home page.
 - o Added a news box on the home page, which shows how much is happening at IFDH;
 - o Added promotion boxes for each project;
 - o Added more buttons on the left side to find information easier and quicker;
- Added individual photos of the board and delegates. This shows our membership and outsiders who we are;
- Updated all membership applications;
- Had every page able to be translated to 90 different languages;

...and most important, we make sure that the website is always up-to-date.

Marketing

With over 30 years of marketing in my background, I continue to reiterate to the board that a professional and consistent organizational image and communication elements are important in acquiring and maintaining all types of membership and sponsorship. You see this in the look of the website, eNews and brochures.

It was my recommendation to the board that it is important to recognize and promote the 30th Anniversary of IFDH. They agreed and approved to proceed with design and development of a logo, banner and video which you have seen, or will see. We also produced a slide for any PowerPoint presentations by the board.

House of Delegates Business Meeting

Not having attended an HOD meeting in the past, we found there were no procedures that described items to prepare, and items to add to the website, other than deadlines for motions, nominations and agenda. We worked with the President, board and Past President to ensure that all elements of the meeting were completed as in the past.

To help for this meeting and in the future, we have developed a To Do List. This has grown each week, including schedule, guest invitations, continuing education, certificates, ballots, name plates, flags, display booth items, agenda, observers, badges, delegate seating chart, gala, outside events, room configuration, opening slide, country member reports and much more.

This may sound obvious, but it gets confusing when there is a local committee working with the hotels and convention centers and the committee is producing some of the items above and you're not sure who is doing what. It's also somewhat cumbersome when delegates send their Attendee Forms to us, while registering and paying their fees to the host committee. Much of the information does not always agree. But the staff and the committee have been in constant communication to ensure that reports on both sides agreed on a weekly basis.

International Symposium on Dental Hygiene

As most of you know, from hosting your own national conference, there are hundreds of details. Initially in 2014, there were several emails going back and forth with the staff, the board and the 2016 ISDH Swiss committee. It was evident that we were not on the same page on several aspects of the event. The board coordinated the site of their meeting in June 2015 in London to meet with the committee during the week of EuroPerio. It was a difficult meeting, but by the end of the evening, we all understood each other and the major responsibilities.

I and my staff have been in in constant communication with the committee on all the details. To ensure consistency in the future from one symposium to the next, we have developed a very detailed set of guidelines, which is included in the Procedures document.

Anas Marketing & Management Contract

In reviewing the IFDH contract with Anas Marketing & Management, the first year was initially for \$15,000/yr. (\$1250/mo.) for 2013-14. I appreciate the board increase for the 2015 calendar year to \$18,000 (\$1500/mo.). Since we only have a proposed 2016 budget that the board has yet to discuss, I have not asked for an increase for 2016, yet.

I'd like the board and delegates to know that all staff track their time on our time management software - by client, by regular task and by new project.

We completed an analysis of our 2015 time for the basic management services agreed upon in the contract (no new projects and no accounting). It shows that our time (and using the lowest hourly rates for small associations) has come out to an average of \$3,968/month and we charge only \$1,500/month. And our actual monthly accounting time is an average of \$502/month and we charge \$350.

By spending a total of 552 staff hours per year and being paid \$18,000 averages \$32.60/hour of actual time spent. Considering that you have a team of various levels of professionals in an office (that cost us more than \$32/hour) and the contract also includes our infrastructure of desks, phone system, computers, fax, and rent, staff education, vacation and healthcare, this is more than an extremely good deal for IFDH.

And please realize that we spent even more hours in 2014 with involvement of legal situations, a longer transition than expected, developing sponsor lists and contacting them and developing a dialogue (never done before by staff), and updating or creating basic forms and reports.

But by being paid \$1,500/month and we should be billing almost \$4000/month, you can see that we are actually losing money on the IFDH account. I did envision that this would be an investment of ours, as I saw potential growth for IFDH and management fees. I didn't think it would be as much time as it has taken for almost every area of the organization.

And, a lot of the time spent has been on my end, who is the most expensive person in the office. Originally much of the work was going to be basic membership services by my staff and that did not turn out to be the case. Obviously, this is my loss.

Also, in 2016, there has already been and there will be a significant amount of time spent on ISDH including almost 14 days of time travelling to and from the HOD & ISDH events, which I was initially not made aware of. I've never been involved with a client whose conference was more than 3-5 days, so this was a surprise.

IFDH is not being run part-time and from someone's home any more. You now have professional association staff available to respond to members full-time, 5 days a week.

Yes, we are being compensated for any new projects (Social Responsibility, GCDF, etc.) but this adds to the overall management time overseeing deadlines and discussing with the President and board.

Therefore I am asking for a very modest increase for the 2016 calendar year to \$24,000 (only \$2,000/mo.) and accounting to \$400/month. I feel this is more than reasonable and fair to IFDH. And based on the budget, it still keeps IFDH in a profit situation.

My goal here is for the board and HODs to understand the number of hours that management of a growing IFDH requires. This open communication with the board and members is important.

Summary

I hope that this synopsis has helped give you a better prospective of all aspects of the administrative work done and changes made to IFDH over the past three years.

The board members' knowledge of the field of dental hygiene combined with professional association management services has helped put IFDH back on proper footing to survive in the long term, while presenting a professional image!

I look forward to working with new President Robyn Watson and her new board of directors to continue the work of this board and take IFDH to the next level!