



## **CSDA Membership Affinity Program Guide for Potential Applicants**

## **Introduction**

The Connecticut State Dental Association is a professional membership association that represents general dentists and specialists. As a state chapter of the American Dental Association, we work in conjunction with the ADA and our twenty-two local chapters to serve the interests of our members. Among the many services the CSDA offers to the dental community is an affinity program that provides discounts on products and services we recommend to our members.

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 that are recommended by our association. Therefore, we must be highly selective when it comes to granting requests for our endorsement.

This document was developed to help companies interested in submitting an endorsement proposal to our association. We recommend you carefully review this document so you can understand the factors we consider when reviewing an endorsement proposal and what we provide to firms that join our program. If you believe you can fit within the program we have outlined below, you may start the application process by completing and submitting the questionnaire on page 8.

## **Background Information on the Connecticut State Dental Association**

The Connecticut State Dental Association was established over 150 years ago 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:

*Communications:* The CSDA disseminates news and information to our members through our website, bi-weekly e-newsletter, quarterly news magazine, periodic direct mailings and social media networks.

*Continuing Education:* Dentists in Connecticut are required to complete twenty-five hours of continuing education every two years in order to maintain their license. Our association offers online and in-person courses to help members satisfy this licensing requirement while also developing the skills they need to excel in their profession.

*Advocacy & Compliance:* We educate state regulators on the challenges our members face and ensure that the dental community has a voice in the public policy discussions that can impact their practice. When laws or regulations are adopted, we help our members understand and comply with these new requirements.

*Annual Meeting and Trade Show:* Over 2,600 dental professionals from across the region attend our annual Charter Oak Dental Meeting. Each year we offer 50 courses during the conference and our exhibit hall includes space for up to 120 vendors.

*Promoting Oral Health Care:* The CSDA is a trusted source for information on oral health care issues. Our website includes patient education materials for dentists and a wide range of information for the public on oral health care topics.

## **Membership Profile**

We have approximately 2,300 member dentists. This includes actively licensed dentists, retired dentists, dental students and faculty. The following is more detailed information on our two primary membership categories:

*Active Licensed Members:* The CSDA has 1,720 members who are licensed and actively practicing dentistry within Connecticut. This represents 67% of the total market share of those in Connecticut who could fall within this category. These active licensed members include 1,214 general dentists (64% market share) and 506 specialists (77% market share).

*Retired Members:* The CSDA also has 527 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.

## **Membership Affinity Program**

Businesses seeking to market their products or services to the dental community often turn to the CSDA for assistance. There are a number of general marketing opportunities available through our association. These include advertising space in our publications, sponsorship of CSDA events, banner advertisements on our website, and other marketing opportunities. However, if a business is looking to stand out from their competition they may seek our endorsement of a particular product or service.

Our members place a great deal of trust in our association. While we are interested in providing our members with access to significant discounts, we also want to preserve the trust and goodwill we have developed with our members. Therefore, we only want to work with businesses that can satisfy our high standards and who understand the unique needs of the dental community.

The goal for this program is to help reputable companies increase their profile within the dental community while providing our members with a discount on superior products or services that we are willing to recommend to the dental community. We also want this program to generate non-dues revenue streams that can provide our association with the resources we need to continue our work on behalf of our members.

## **Exclusions**

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 decline to consider anything that may be duplicative of the benefits we already provide to our members.

We also operate a separate endorsement category for insurance products and services. Brokers or carriers interested in this category should contact the staff liaison for the CSDA Council on Insurance (Ed Owens, [ewens@csda.com](mailto:ewens@csda.com)) to obtain information about how they select endorsements for group or individual plans.

## **Endorsement Parameters**

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.

*Value:* The product or service must help dental practices operate in a cost effective manner or deliver exceptional personal value to dentists.

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

*Membership Benefit:* The price of the product or service offered to our members must be competitive to what they can find on their own in the general marketplace. We also strongly favor offers that provide a “members only” discount that is better than what other dentists or general customers would pay for the firm’s product or service.

## **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 contact us 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 we become involved in the dispute. Our success as a membership association is dependent on our ability to respond to our members’ needs and assist them in overcoming the challenges they face on a daily basis.

Any complaints from our members must be responded to in a timely manner. Firms participating in our 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 a senior management official with decision-making authority to respond quickly to any inquiries we have. We also expect that all reasonable complaints from our members will be resolved in their favor and to their satisfaction.

*Financial Costs:* One key goal of this program is to provide our association with non-dues income in exchange for our endorsement. This may take the form of a flat fee or an agreed upon percentage of the sales that are made to our members. However, when the compensation can vary based upon sales or other activity, we will require a minimum annual income guarantee. This provides us with a floor that we can use to ensure that our association doesn't lose any money with respect to a specific endorsement.

*Marketing Commitment:* Endorsed companies are expected to actively market their services directly to our members. While we 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 integrated marketing plan that outlines the steps they will take to market their products or services to our members. This plan should outline the firm's own outside marketing activities and detail their plans for utilizing CSDA resources (i.e. our mailing lists, advertising space in our magazine, attendance at CSDA events, etc.) to reach our members.

*Reports and Records:* The CSDA requires that endorsed businesses submit a report that details the number of new or renewing customers they have from within our membership.

## **Contractual Requirements**

The CSDA has several requirements for the endorsement agreements that are necessary in order to join our membership affinity program.

*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 programs 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 must review and approve all marketing materials that reference our endorsement or that are distributed to our members. We will not unreasonably withhold such 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 agreements that include automatic renewal clauses.

## **Exclusive Benefits**

The following are the standard benefits firms receive when they participate in our membership affinity program.

*CSDA's Endorsement:* The primary benefit of joining our affinity program is the ability to reference our endorsement in the firm's marketing materials. Endorsed business receive a license to use our name and logo in their advertising. The CSDA also periodically promotes our membership affinity program by creating posters, flyers and advertisements that identify all the firms that have joined our program.

*Website Placement and Links:* The CSDA maintains a special page on our website to promote firms that participate in our membership affinity program. This page includes a brief description of each endorsed product or service along with the special discounts and enhanced services that are available to CSDA members. We will also include a link from our website to any other website or customized landing page that is used for placing an online order with the endorsed firm.

*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 may also supply the association with specific marketing materials that can be included in these packets.

*CSDA Events:* Endorsed firms may supply the association with specific marketing pieces (flyers, brochures, etc.) that can be distributed on a rotating basis at our package program courses and other events.

*Membership Lists:* The CSDA leases our membership mailing list to outside firms. Non-endorsed firms that lease this list pay a fee each time they use the list for a mailing. However, endorsed firms receive a complimentary copy of our mailing list and are not charged a fee for each mailing. The CSDA will also segment this list for endorsed firms if they are interested in conducting a targeted marketing campaign based upon any demographic data contained with our membership database.

## **Proposal Review Process**

The following is a brief overview of 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. Applicants may also provide electronic copies of other materials they would like us to consider when reviewing their proposal.

*Screening the Proposals:* These materials will be emailed to the CSDA Membership Affinity Committee for their review. If the committee is interested in a proposal, they will authorize staff to schedule a meeting so that the firm may present their proposal directly to the committee.

*Committee Presentation:* During this stage of our process, representatives from the firm make a presentation directly to the committee. If 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.

## Questionnaire

If your business is willing to accept our program requirements, you may apply to join our membership affinity program by answering the questions below and submitting this information to Jesse Dennehy, Director of Membership and Professional Services ([jdennehy@cdda.com](mailto:jdennehy@cdda.com)). Please provide as much detail as possible. This information will be provided to our Membership Affinity Committee so they may conduct a preliminary review of your proposal.

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 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 spend additional money to advertise in our publications, lease exhibit space at our events or utilize other CSDA resources to market your product or service?
8. What special pricing or enhanced features are you offering to our members through this program and how does this compare to the regular pricing you offer to non-member customers?
9. How is your company offering to compensate the CSDA for your participation in this program? Please include details regarding the model of compensation you are offering and the amounts (both fixed and variable) that would be offered to the CSDA.
10. Is your company comfortable with the conditions we have outlined in this document? Are there any requirements your firm would not be able to agree to? If so, please specify.

Name of Firm: \_\_\_\_\_

Name of Contact Person: \_\_\_\_\_

Telephone Number: \_\_\_\_\_ Email: \_\_\_\_\_