



## Missouri Dental Association Board of Trustees Meeting

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***November 7, 2025 • 10:00 AM***

Join Zoom Meeting

<https://us02web.zoom.us/j/89314521147>

Meeting ID: 893 1452 1147

# Missouri Dental Association Board Agenda

November 7, 2025 • 10:00am

## Join Zoom Meeting

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**Meeting ID: 893 1452 1147**

*Note: The President may take agenda items out of order in order to expedite the business of the Board.*

1. Pledge of Allegiance and Opening Prayer
2. Opening Remarks - Dr. Ron Wilkerson
  - Disclosure of any conflicts of interest with agenda items
3. Adoption of Agenda
4. Meeting Recess for MDIS Shareholders' Meeting
5. Legislative Update - Dr. Mike Berry, Nikki Strong, Grace Riley
6. President Report - Dr. Ron Wilkerson
  - OPA Update
  - Missouri Dental Board Meeting Assignment - October 9, 2026
7. Reports & Decision Items
  - MDA Foundation Board Election
  - 2026 ADA Delegates & Alternates
  - HOD Taskforce Update
  - EFDA Motion
8. Executive Office Reports
  - Executive Director - Vicki Wilbers
    - ADA House of Delegates Update
    - Missouri Dental Board Meeting Update
    - Sunset Expired Ad Hoc Committees
    - Revamp of Strategic Plan
    - Resolution to Change Monitoring Report Presentation
    - Leadership Summit - Paul Roberts
9. Adoption of Consent Agenda
  - September 12, 2025 Board Meeting Minutes
  - Monitoring Reports
    - 1.1 Financial Condition & Activities
    - 1.5 Communication and Support
    - 1.9 Membership Recruitment & Retention
  - ADA CERP Discontinuation Confirmation
  - MDA Foundation Meeting Minutes
  - Missouri Dental Board Update
  - Dental Lifeline Network: DDS Missouri Update
10. Resources at Your Fingertips
  - MDA Strategic Plan

- Frequently Used Acronyms

11. Unfinished Business
12. New Business
13. Executive Session
14. Next Meeting and Announcements
  - Board of Trustees Meeting: January 30, 2026 10:00am - MDA Executive Office
  - MDA Dental Day at the Capitol: March 4, 2026 - Morning
  - MDA Leadership Summit: March 4 2026 – 12:00pm lunch, 1:00- 4:00pm meeting - MDA Executive Office *\*Mandatory*
15. Adjournment



## Meeting Recess - MDIS Shareholders Meeting

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## Legislative Update

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## President Report

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- **OPA Update**
- **Volunteers MDB Meeting: October 9, 2026, 9:00 am virtual**



## Reports & Decision Items

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October 21, 2025

Dr. Ron Wilkerson, President  
Missouri Dental Association  
3340 American Avenue  
Jefferson City, Missouri 65109

RE: Election of MDA Foundation Board

Dear Dr. Wilkerson,

As a subsidiary of the MDA, the MDA Foundation (MDAF) Board Members are nominated by the MDAF Board and elected by the MDA Board of Trustees. On behalf of the MDAF Board, I submit the following nominees for consideration and election at the November 7, 2025 MDA Board meeting.

The MDA Foundation Board voted to submit Drs. Emily Hahn, Kirk Opdahl, Chloe Stuck, Danielle Riordan, and Caitlin Rosemann to the MDA Board of Trustees for official election to another 3-year term on the MDAF Board.

On behalf of the MDAF Board, I respectfully request that the MDA Board of Trustees consider these nominations.

Regards,

A handwritten signature in black ink, appearing to be 'JLB', is written over a horizontal line.

Jeremy L. Bowen, DDS  
MDA Foundation Chair

JLB/mmk

cc: Paul Roberts, MDA Foundation Director  
Vicki Wilbers, MDA Executive Director

## MISSOURI DENTAL ASSOCIATION BOARD RESOLUTION

|                                                                          |                                                                                                     |
|--------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------|
| <b>Resolution Subject:</b> 2026 ADA Delegates and Alternates             |                                                                                                     |
| <b>Submitted By:</b> Staff                                               | <b>Date Submitted:</b> 10/15/25                                                                     |
| <b>Financial Implication:</b> \$ 0                                       | <b>Ad Hoc Committee Needed?</b> Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> |
| <b>Resolution to be considered at the</b> November <b>board meeting.</b> |                                                                                                     |
| <b>Policy Division:</b> Governance Process                               |                                                                                                     |

**Background Information** [Click here to enter text.](#)

The MDA received notice from the ADA in August 2025 that Missouri's allocation of ADA Delegates and Alternates was changed from 7 Delegates and Alternate Delegates to 8 Delegates and 8 Alternate Delegates for the years of 2026-2029. The MDA recalculated the ADA Delegates and Alternate Delegates using the method from the MDA Bylaws and the extra delegate/alternate was allocated to the Greater Missouri Caucus. Greater Kansas City and Greater St. Louis Delegate and Alternate allocations did not change.

The Greater Missouri Caucus was notified of the revised allocation and held a caucus meeting on the evening of October 14, 2025 to discuss and vote on a new rotation schedule. The new rotation schedule allows representation from each of the 8 component societies at every ADA House of Delegates meeting. The Greater Missouri Caucus unanimously agreed to the new rotation. The caucus further agreed that if a component society was unable to fill the four year term (2 years as alternate/2 years as delegate) by the deadline date established by the MDA, the component society forfeits the four year term, and the Greater Mo Caucus will put out a call to members to vote for an at large Greater MO member to fill the term. The Caucus will meet to vote on the position prior to the MDA Board meeting at which the ADA Delegates and Alternates are elected.

Greater Springfield and Southwest Dental Societies were contacted 10/15/25 to alert them of the opportunity to have an alternate delegate begin a 4 year-term at the 2026 ADA House of Delegates. The MDA sent out an email on behalf of the SWDS President to alert their members of this opportunity.

**Resolution** [Click here to enter text.](#)

RESOLVED, that the following members be elected as delegates and alternate delegates to the 2026 Annual Meeting of the House of Delegates of the American Dental Association.

| Delegates                | Alternates            |
|--------------------------|-----------------------|
| Philip Batson (C)        | Garret Cochran (KC)   |
| Robert Butler (SL)       | Brett Durbin (SP)     |
| Amanda Fitzpatrick (NE)  | Louise First (SL)     |
| Robyn Hayes (SL)         | Emily Hahn (SL)       |
| Prabu Raman (KC)         | Emily Mattingly (NW)  |
| Christine Schoolman (SE) | Linda Niessen (SW)    |
| Jennifer Wheeler (SL)    | Danielle Riordan (SL) |
| Connie White (KC)        | Wendy Weimer (KC)     |

## House of Delegates Governance Task Force Update

Dr. Amanda Fitzpatrick, Dr. Aaron Bumann (Chair), Dr. Ron Wilkerson, Vicki Wilbers and Margie Kunze met with Vista Cova Facilitator Lowell Aplebaum and Researcher Chelsea Killam on October 3, 2025 to discuss objectives and finalize the timeline and lines of research and inquiry for the task force.

The following milestones were agreed upon.

### Milestones

1. Task Force Kick Off Meeting - **November 24, 2025**
  - A (90 minute) virtual convening of the Task Force
  - Opens with a presentation of the current MDA governance system
  - Facilitator shares current best practices
  - Opportunity to gather the Task Force's input into the research approach
2. Research (*Fall-Winter 2025*)
  - 16 Interviews of the HOD Taskforce & Governance Manager
  - 4 Focus Groups
    - o Likely MDA Board Members not on Task Force
    - o Likely the New Dentist Committee
    - o Possibly KC/Northeast/Northwest/Central, limited to 10
    - o Possibly SL/Southeast/Southwest/Springfield, limited to 10
3. Draft recommendations
  - After the research presentation, the first round of recommendations will be drafted by MDA leadership, the final approach of which will be determined in process.
4. Governance Retreat (*Winter 2026*)
  - In-person meeting with the Task Force to review the draft recommendations and refine them for a final version that can be presented to the Board and any key stakeholders.
5. Final recommendations delivered (could be multiple sets, tiered sets of recommendations)
6. Virtual Presentation of Recommendations (Early to late Spring 2026)
  - Vista Cova will work with MDA leadership to prepare for and virtually present the recommendations to the Board of Trustees for approval.

Following the meeting, the initial 90 minute Task Force Kick Off virtual meeting was scheduled for November 24, 2025 at 6:00pm. The meeting will begin with a review of the MDA Governance structure for those who are not familiar with the current structure. Drs. Fitzpatrick and Bumann Vicki and Margie were tasked with developing a committee charge. We also felt it was important to establish rules of engagement and expectations upfront, including a statement on confidentiality of discussions. **See next page for Task Force Charge and Rules of Engagement.**

The in-person retreat for refining the task force recommendations needs to be identified and scheduled as soon as possible (ideally early March 2026). Multiple meetings of the taskforce will be held virtually throughout and to be set and determined by the taskforce.

## House of Delegates Governance Task Force

The MDA's House of Delegates adopted Resolution 2025H-7:

RESOLVED, that a taskforce, whose composition is representative of the percentage of active membership by component society, be appointed by the Speaker of the House in consultation with the Board of Trustees to be charged with increasing participatory governance and exploring alternatives to the MDA House of Delegates; and be it further,

RESOLVED, that the taskforce shall identify a structure or process to ensure continued membership engagement and input on policy matters; and be it further,

RESOLVED, that the taskforce through the Board of Trustees provides an interim report back to the 2026 MDA House of Delegates.

### Task Force Charge:

- To increase participatory governance
- To explore alternatives to the MDA House of Delegates
- To identify a structure or process to ensure continued membership engagement and input on policy matters

### Rules of Engagement:

- We are here to represent and work on behalf of the MDA only—not the components, other organizations, or individuals.
- Discussions
  - Addressing MDA's structure will be hard. Belief systems have been in place for decades, and an open minded approach to hearing all viewpoints will be necessary.
  - This could include discussions on Board makeup.
  - This will NOT include discussions on component restructuring.
  - Respect the input and viewpoints of all individuals serving.
- Expectations
  - Your time and commitment are valuable to this process. We will do our best to schedule meetings with as much lead time as possible, but your presence is expected.
  - If you have to miss a meeting, you can submit written comments, but we will not relitigate past work of the committee from the meeting you missed.
  - If you know you have limited time available, or know that you will be missing multiple meetings, we will ask that you recuse yourself. We must have consistent and vibrant input to keep moving forward.
  - There will be homework. We expect each member to come to every meeting prepared and ready to discuss the topics at hand.
- Confidentiality
  - Due to the sensitive nature of the discussions to be had by this group regarding the restructuring of the MDA it is paramount that all discussions stay within the Task Force. We want to ensure open and honest discussion, and the freedom to know that your opinions will be kept in confidence.
  - In order to preserve the integrity of the Task Force, all recommendations will come in the form of an agreed upon report from the Task Force.

## EFDA Course Fees

At the September 12, 2025, board meeting, Dr. Jon Copeland moved and the board approved motion that starting January 1, 2026, **“EFDA courses can only be taken by auxiliary staff of MDA member dentists, with the exception of currently licensed programs.”**

After a legal review of the minutes from the Board meeting, the following comments were provided by Harvey Tettlebaum:

*If the EFDA training programs or material developed that MDA offers its members are paid for with any money from any governmental agency, then the restriction Dr. Copeland’s message places on access might be problematic.*

*Generally, we recommend that if an association wants to place restrictions for non-member access to education or training programs, it does so by charging non-members more for the cost of access or training, than what is charged members. MDA may already have a two-tiered pricing system that applies to non-members for access to certain items. The reason for using a two-tiered pricing system is to allow non-members to experience the quality of the programs offered its members, and, at the same time, the financial benefit of membership. Perhaps, a discussion along those lines occurred in connection with Dr. Copeland’s Motion. The draft minutes do not reflect that discussion.*

In addition, with the OPA still in Pilot Project status, we don’t want to do anything to jeopardize it moving forward. Making EFDA programs, which are touted as increasing access to care, inaccessible to non-members and their staff members, could put MDA in a bad light.

It is recommended that the Board rescind the resolution as previously stated and move a different resolution to fall in line with legal’s suggestion.

The MDA already has a two-tiered pricing system with current EFDA programs, in which non-members pay 50% in additional course fees. \$600 vs \$900 for Restorative I, Ortho; \$700 vs \$1050 for Fixed and Removable Pros; \$975 vs \$1475 for Restorative II. For some of these courses, an additional one-time non-member fee of \$300 may not convince one to convert to membership. But if the MDA changed to an additional flat non-member fee of \$500-1000 to all EFDA courses, that might be enough to convince that non-member to apply for membership.

There does need to be some promotion in that the development and implementation of the EFDA and OPA programs have been financed by the MDA and are a true benefit to members. This might also show current members what a huge benefit it is to continue membership.

To note, this does not preclude an assistant that works in a multi doctor practice, from stating their supervising dentist is a member, when their supervising dentist may not be. It’s a predicament on how to truly address. MDA staff is currently looking into ways to “certify or validate” that a specific assistant is actually working for/with a specific supervising dentist. However, that could be labor intensive for both the doctor/assistant who are registering for a course and the MDA staff to police and verify. In addition, we would need to have legal consult in determining language and ramifications of what course of action MDA could take if statements by assistants are falsified.

**The MDA team recommends the following resolution with the Board to determine the non-member fee assessed to registrations from non-member auxiliary staff.**

Resolved, that the following resolution from the 09/12/25 Board of Trustees meeting be rescinded:

*RESOLVED, that starting January 1, 2026, EFDA courses can only be taken by auxiliary staff of MDA member dentists, with the exception of currently licensed programs;*

and be it further,

Resolved, that beginning January 1, 2026, the pricing of all Expanded Function Dental Assistant (EFDA) courses hosted by the MDA will be increased from 50% to 100% (double) the price of the MDA member price for any registration where the supervising dentist is not a member of the MDA.



## Executive Office Reports

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## ADA House of Delegates Update

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## MISSOURI DENTAL ASSOCIATION BOARD RESOLUTION

|                                                                          |                                                                                                     |
|--------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------|
| <b>Resolution Subject:</b> Sunset Ad Hoc Committees                      |                                                                                                     |
| <b>Submitted By:</b> Vicki Wilbers                                       | <b>Date Submitted:</b> 10/21/2025                                                                   |
| <b>Financial Implication:</b> \$ 0                                       | <b>Ad Hoc Committee Needed?</b> Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> |
| <b>Resolution to be considered at the <i>November</i> board meeting.</b> |                                                                                                     |
| <b>Policy Division:</b> Executive Limitations                            |                                                                                                     |

**Background Information:** Executive Limitations Policy 1.5 Communication and Support to the Board calls for the Executive Director to not fail to conduct an annual review and provide a report to the board on the ad hoc committees which have ceased to exist due to task completion.

The only remaining ad hoc committee of the board currently is the Governance Review Ad Hoc Committee. With the establishment of the House of Delegates Governance Task Force, it is my suggestion that this committee be sunset.

**Resolution:** that the Governance Review Ad Hoc Committee be sunset.

# **MDA** Missouri Dental ASSOCIATION

## **Strategic Plan**



## **Mission Statement**

*Helping All Dental  
Professionals Succeed*



### **PROFESSIONAL IMPACT**

Helping dental professionals thrive at every stage.

#### **We Will**

- ▶ Address the evolving needs of dental professionals while expanding engagement opportunities and benefits to grow association membership.
- ▶ Strengthen a culture grounded in diversity and inclusion.
- ▶ Promote overall well-being and professional satisfaction among dental professionals.



### **COMMUNITY IMPACT**

Advocating for better oral health and a stronger profession.

#### **We Will**

- ▶ Strengthen partnerships and outreach initiatives to improve oral health across Missouri.
- ▶ Expand engagement in legislative initiatives that advance the profession and public oral health.
- ▶ Support ongoing improvements to state oral health programs.



### **ORGANIZATIONAL STABILITY**

Ensuring lasting strength to serve the profession.

#### **We Will**

- ▶ Grow total annual revenue by 2-4% while keeping reserves and non-dues revenue at a minimum of 50%.
- ▶ Establish a sustainable membership and organizational structure that supports ongoing growth and long-term success.
- ▶ Create alignment and opportunity among the MDA, local components, and its subsidiaries for shared success.

*The MDA is the premier state professional association for dentists and the teams they lead.*

## **MDA Board of Trustees Resolution**

**Resolution Subject:** Monitoring Reports Policy Suspension

**Submitted by:** MDA Executive Director

**Date:** 10/17/25

### **Background:**

Following the Board Training with Bob Harris, the MDA Team has been looking at new ways to bring monitoring reports to the Board in a more user friendly, easy to read dashboard type format. Because the existing Board Management Linkage Policy 3.4 Monitoring ED Performance dictates the manner in which monitoring reports must be reported, the Executive Director is requesting that the following statement in item (4) be suspended for the year 2026 to determine if a dashboard report is a more favorable reporting mechanism.

- (4) All policies that instruct the ED will be monitored at a frequency and by a method chosen by the board. The board can monitor any policy at any time by any method but will ordinarily depend on a routine schedule.

*The following reports shall consist of a restatement of the policy, followed by a statement outlining the Executive Director's interpretation of the policy, followed by a statement that the Executive Director believes to be in compliance with the policy which includes specific evidence that supports that claim.*

### **Resolution:**

Resolved, that item (4) of Board Management Linkage Policy Monitoring ED Performance be suspended for the year 2026 to allow the MDA Executive Director to present the Monitoring Reports in a more user-friendly and/or dashboard type format.



**Missouri Dental**  
A S S O C I A T I O N

## Consent Agenda

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## **Major Actions of the Missouri Dental Association Board of Trustees September 12, 2025**

- Meeting called to order by Dr. Ronald Wilkerson at 9:04 a.m.
- Officers present: Ronald D. Wilkerson, President, St. James; Emily A. Mattingly, Chillicothe, President-Elect/Secretary; Mack A. Taylor, Treasurer, Bernie; and Amanda L. Fitzpatrick, Speaker, Macon.
- Board members present: Philip A. Batson, Columbia; Michael W. Berry, Moberly; Lisa M. Bosch, Edina; Jon M. Copeland, Wildwood; Emily A. Hahn, Chesterfield; Ashley D. Meyer, Springfield; Rachael M. Parker, Independence; Jon L. Reagan, Joplin; Steven R. Schoolman, Cape Girardeau; Fallon L. Stiens, Stanberry; and Wendy J. Weimer, Kansas City.
- Board member absent: Douglas A. Wyckoff, Cameron.
- Staff members present: Vicki Wilbers, Executive Director; Melissa Albertson, Communications Director; Riley Bernskoetter, Programs Manager; Stacey Hemmel, Operations Director; Devin Jungmeyer, Digital Content and Marketing Manager; Margie Kunze, Governance Manager and Executive Assistant; Mandy Lewis, Education and Events Director; Halie Payne, Professional Affairs Director; and Paul Roberts, Engagement & Outreach Director.
- Guests present: Dr. Mark Zust and from the lobbying team, Nikki Strong and Grace Riley.
- Dr. Wilkerson led the board in the Pledge of Allegiance.
- Dr. Wilkerson welcomed new Greater St. Louis Dental Society Trustee Dr. Emily Hahn and new Northwest Dental Society Trustee Dr. Fallon Stiens.
- Dr. Wilkerson requested that board members review the agenda and disclose possible conflicts of interest with any agenda items. Dr. Copeland reported that he continues to make materials for the EFDA courses.
- Dr. Taylor moved and the board approved the adoption of the agenda.
- Ms. Nikki Strong provided an update including details on the sponsors planned for the Dental Medical Loss Ratio (DLR) bill and the continued progress on the Oral Preventive Assistant (OPA) Pilot Project. Additionally, she outlined the Dentist and Dental Hygienist Licensure Compact legislation that nearly passed in 2025 but fell short due to tensions in the Missouri Senate during the final week of session. The Association of Dental Support Organizations (ADSO) has confirmed they will refile this legislation in 2026. The MDA will provide support as appropriate to ensure Missouri joins the growing number of states—12 enacted and four pending—that have adopted the Compact. Regarding dental sales and use tax, in mid-July, the MDA was informed that the Missouri Department of Revenue (DOR) was making updates to the tax matrices which would reflect the following items are tax exempt when sold by a dentist or orthodontist and when purchased by a dentist or orthodontist:
  - Wires, retainers, dental straighteners and aligners
  - Custom fitted trays designed for the delivery of prescribed medication
  - Prescribed mouth guards
  - Occlusal splints

Members were informed through multiple communications from the MDA as well as the American Association of Orthodontists.

With regard to appropriations, Ms. Strong reported that the state's budget will be tighter in the coming years due to the depletion of COVID-19 relief funds and the effects of the One Big Beautiful Bill, making appropriations advocacy a key priority.

For the 2026 session, the MDA will work to:

- Maintain Medicaid reimbursement rates at 80% of the 50th percentile of UCR.
  - Maintain \$180,000 for Donated Dental Services.
  - Maintain \$400,000 for the Elks Mobile Dental Unit.
  - Maintain or improve the rates of dental anesthesia.
  - Secure the Office of Dental Health within the Department of Health and Senior Services.
- Dr. Copeland moved and the board approved motion to approve the 2026 MDA Legislative Agenda. (Attached.)
  - Dr. Copeland moved and the board approved motion that Jessica Dresner, MO HealthNet Deputy Director, be awarded the 2025 MDA Legislative Excellence Award for her collaboration with the MDA and other stakeholders to resolve issues within the Dental Medicaid environment and most recently, her instrumental help in securing the funding increase for general anesthesia rates in 2025.
  - Ms. Wilbers gave an update on the OPA pilot program. She said we continue to receive inquiries from other states asking for information on our OPA pilot program. Dr. Wilkerson, Ms. Lewis, Dr. Guy Deyton and she have been on multiple calls over the past several months. The number one priority is finalization of the pilot and allowing of this in law. The next most important step will be to find trainers.
  - The board discussed the board training presented by Bob Harris. The board agreed the training was beneficial to bring in other perspectives and allow the board to refocus on the bigger picture. Board members said they enjoyed spending time together away from the board table as well. Ms. Wilbers said two things that stuck out to her that were discussed were who can attend the board meetings and not having a substitute for absent board members, which is currently in our Bylaws. She said that is something that she and Ms. Kunze will be looking into and working on for the next board meeting because it is something that needs to be considered. Ms. Kunze researched sharing meeting minutes, and it was determined that they should be shared with members, and the board agreed that sharing minutes is not an issue but that the minutes should be brief.
  - The board also discussed the key takeaways that were identified at the training session and the desire to begin to tackle the list (below). Ms. Wilbers said the MDA team will need to prioritize items into what we can do now and what we can begin working on in terms of capacity. For instance, dashboard reports are something the team is already discussing because it is a part of the MDA Strategic Plan. The current governance taskforce will also attempt to address some of the things that are preventing us from being innovative and nimble.

#### **KEY TAKEAWAYS**

1. Innovation
2. Evaluate Board Structure
3. Redesign Board Meeting Agenda
4. Dashboard Reports (Graphics)
5. Redesign/Update Strategic Plan (Make succinct)
6. Streamline Policies
7. Strategic Plan as Business Card
8. Create Board Scorecard/Checklist
9. Transform OPA into "Golden Handcuffs"

10. Look for other “Golden Handcuffs” Opportunities
  11. Monetize Value of Advocacy
  12. Trim the Fat, Make Concise (in Everything) to be Innovative
  13. Access to Expertise – Legal/HR
- Dr. Wilkerson made the following appointments:
    - Action Team Leader Chair: Dr. Aaron Bumann
    - State ADPAC Chair: Dr. Robert Butler
    - Dental Board Appointment Committee: Dr. Wendy Weimer (Chair), Dr. Ashley Meyer, and Dr. Fallon Stiens
    - Education Committee Board Liaison: Dr. Amanda Fitzpatrick
  - Dr. Wilkerson requested volunteers to attend the virtual Missouri Dental Board meetings that have been scheduled thus far in 2026. Dr. Wilkerson and Ms. Wilbers and Ms. Payne will attend the meetings. All meetings begin at 9:00am.
    - January 9, 2026: Drs. Mike Berry and Wendy Weimer
    - April 10, 2026: Drs. Phil Batson and Ashley M
    - July 17, 2026: Drs. Phil Batson, Emily Hahn and Wendy Weimer
  - Ms. Wilbers provided an Executive Office update which included:
    - 2025 House of Delegates Resolutions/Status Updates:
      - o 2025H5-LRC Terms: Current committee members' terms have been staggered so that all committee members' terms will not expire the same year. All newly elected LRC committee members will serve four-year terms.
      - o 2025H-10 ERISA Law Relating to Governing of Dental Benefits: The resolution called for the MDA to direct the LRC to lobby the Missouri AG to join the Oklahoma lawsuit and encourage other states to do the same to encourage the Supreme Court to act on the abuse of ERISA laws. However, the Supreme Court refused to hear the case. The ADA is spending a significant amount of time looking for documentation of plans using ERISA exemptions and is encouraging dentists to send documentation to their state associations. The MDA will explore outreach to members to identify issues and address with the newly appointed Missouri Attorney General.
      - o 2025H-9 Private Equity Ownership in Healthcare: The ADA has resolution 502 and 502B which calls for transparency in dental practice ownership and corporate investment. This is something we will monitor closely.
      - o 2025-8: Election of MDA Delegates to the ADA: This resolution was referred to the Board. The MDA received notice that the ADA reallocated delegates for the ADA House of Delegates for 2026-2029 and Missouri was allocated an additional delegate/alternate, increasing the number from seven to eight. The ADA allocation was recalculated using this number and the additional delegate/alternate was allocated to the Greater Missouri Caucus. This allows for each component society to be represented at the ADA House of Delegates level. The MDA team created a new rotation schedule which represents a 4-year rotation for each delegate/alternate from Greater Missouri. The Greater Missouri Caucus will be asked to review and vote on the rotation schedule, or develop one of their own, prior to the election of the ADA Delegates/Alternates by the MDA Board of Trustees, which is typically done in November. The caucus will also be asked to determine what will happen if a component society is unable to find a member from their component who wishes to serve as a delegate or alternate to attend the ADA House of Delegates. The MDA team will work with Dr. Ashley Meyer, Greater Missouri Caucus Chair, to notify the caucus and approve a rotation schedule.
    - Missouri Dental Board update: Ms. Wilbers said the possible elimination of the nitrous oxide permit has been added to the November Missouri Dental Board (MDB) agenda. She also reports that the MDB will require licensees to upload CE information through CE Broker for licensure renewals in 2026.

- Board Member Terms: Ms. Kunze reviewed Board Members terms and expirations with board members since with the expansion of terms with moving the House of Delegates, some were confused as to when their terms expire.
- Ethics Law/PAC Donations: Ms. Payne said the Missouri legislature passed a law regarding reporting requirements and how PACs collect money. Donors must attest that they are in compliance with the new law every time they donate. This affects our monthly donations and PAC donations through our online store. We are changing the dues statement to accommodate this so we will be able to receive donations with dues. Those who have contributed monthly thus far will be contacted to attest they comply with the new law.
- Communications Survey: The board was asked to complete a communications survey so that we could determine the best way to communicate with them. The overall response is that the board does want emails, along with a reminder text and board members really don't use the website. We are utilizing a new texting app that was used when the board materials were sent out. The board members were given the number to add to their contacts from which they will receive reminder texts.
- New Award from the Board: Ms. Wilbers discussed a new award category with the board.
- Dr. Megan Krohn, Missouri State Dental Consultant, presented an update to the board on the Missouri oral health workforce shortage.
- The board discussed the Membership Outreach Committee created at the last meeting. The board agreed on a committee charge but did not decide on a committee term or composition but rather, decided to do a call to the membership similar to what was done when creating the House of Delegates Governance Task Force. The board asked the MDA team to send an email to the membership requesting self-nominations. The committee composition, terms, and direction will be decided afterwards. Dr. Bosch moved and the board approved motion that the committee charge be as follows: "The Membership Outreach Committee is charged with developing and implementing strategies to strengthen member connections to the Association, foster professional networking and involvement, and ensure members are aware of and benefit from the resources, programs, and services available to them."
- The board convened into executive session.
- The board reconvened into regular session.
- Dr. Berry moved and the board approved motion to elect the following 2026 ADA Action Team Leaders.

| Action Team Leader | District/Legislator                        |
|--------------------|--------------------------------------------|
| Kirthi Tata        | 1 <sup>st</sup> District – Wesley Bell     |
| Robert Butler      | 2 <sup>nd</sup> District - Ann Wagner      |
| Mark Zust          | 3 <sup>rd</sup> District – Bob Onder       |
| Ashley Meyer       | 4 <sup>th</sup> District - Mark Alford     |
| Aaron Bumann       | 5 <sup>th</sup> District - Emanuel Cleaver |
| Lisa Bosch         | 6 <sup>th</sup> District - Sam Graves      |
| Alan McQuigg       | 7 <sup>th</sup> District - Eric Burlison   |
| Kati Pyle          | 8 <sup>th</sup> District - Jason Smith     |
|                    | <b>U.S. Senate</b>                         |
| Ron Wilkerson      | Josh Hawley                                |
| Emily Mattingly    | Eric Schmitt                               |

| New Dentist Nominee |  |
|---------------------|--|
| Chloe Stuck (CDS)   |  |

- Dr. Fitzpatrick discussed the process for selecting the members of the House of Delegates Task Force and presented the members for approval. Dr. Berry moved and the board approved motion to accept the task force members: From the Central, Drs. Phil Batson, JC Standlee and Christopher Kollath. From Greater Kansas City, Drs. Aaron Bumann, Wendy Weimer and Garret Cochran. From Greater St. Louis, Drs. Emily Hahn, Bob Butler, Robyn Hayes, Danielle Riordan, Robert Thompson, and Megan Lenahan. From Greater Springfield, Dr. Ahad Saqib. From Southwest, Dr. Aldo Del Sol Martinez. From Southeast, Dr. Dennis Nguyen. Dr. Rachael Parker will serve as the New Dentist Committee Liaison and will be a non-voting member of the task force. Ms. Wilbers announced that the Finance Committee approved to hire Visa Cova to facilitate the work of the task force.
- Dr. Taylor moved and the board approved motion to adopt the consent agenda which included the following:
  - May 9, 2025 Board Meeting Minutes
  - Monitoring Reports
    - o 1.1 Financial Condition & Activities
    - o 1.4 Compensation & Benefits
    - o 1.6 Treatment of Staff
    - o 1.7 Treatment of Consumers
    - o 1.8 Membership
    - o 1.9 Membership Recruitment & Retention
    - o Strategic Plan Status Updates
  - LRC Meeting Minutes
  - MODentPAC Meeting Minutes
  - MDIS Reports
    - o MDIS Meeting Minutes
  - Missouri Dental Board Update
  - DDS Missouri Update
- Dr. Wilkerson asked if there was any unfinished business and there was none.
- Dr. Wilkerson asked if there was any new business. Dr. Jon Copeland moved and the board approved motion that starting January 1, 2026, EFDA courses can only be taken by auxiliary staff of MDA member dentists, with the exception of currently licensed programs.
- Dr. Wilkerson reminded the board that the November 7, 2025 Board of Trustees meeting will be held virtually beginning at 10:00am and will include the MDIS Shareholders Meeting.
- With no further business, the meeting was adjourned at 2:28 p.m.



## Monitoring Reports

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# MONITORING REPORT

October 15, 2025

## 1.1. financial condition, activities and budgeting

**1.1 Financial Condition, Activities and Budgeting.** With respect to the organization's budgeted and actual financial condition and planned activities for any fiscal year (defined as the year ending December 31) or the remaining part of any fiscal year, the ED shall not cause or allow the development of fiscal jeopardy or a material deviation of actual expenditures from board priorities.

*Interpretation: Budgeted and actual financial condition and planned activities. The budget is an educated guess of annual operating costs to provide for all planned activities that must be balanced by the actual financial condition of the association. As the year progresses, some of the costs change because circumstances change, or programs are added. Development of fiscal jeopardy, the ED shall not allow programs or purchases to cause the association's financial resources to dwindle to the point of causing use of reserve funds to pay for the operational needs of the association, nor cause the operational expenses to escalate to the point where programs cannot continue. Material deviation of actual expenditures from board priorities established in Ends policies. Interpretation: Board priorities established in the Ends policies shall be the guiding principle when developing activity budgeting.*

Further, without limiting the scope of the foregoing by this enumeration, the ED shall not:

(1) Fail to include reports of all income and expense or fail to include credible projections of revenues and expenses; separation of operational, reserve, Relief Fund and other funds; and disclosure of planning assumptions in financial budgeting for any fiscal year or the remaining part of any fiscal year.

*Interpretation: Credible projections, the ED shall research past operational costs, predict those costs for the ensuing year based on previous history and increase in CPI; include a study of how the expenses were incurred and ferret out any unnecessary expenditures or programs that can be eliminated or scaled down or funded using another income source; investigate possible sources for generating income and make an educated assumption of the amount of that projected income.*

Evidence: September 30, 2025, Balance Sheet and Income Statement will be used for this report. As of this date, we had \$96,298.21 in the general checking account; we are in line with FDIC limits.

### **Income and Expenses:**

**Dues:** We collected \$665,644.39 in dues, which is 89% of budget expectations. This is down 4% compared to September 2024.

### **CE Events:**

**Missouri Dental Association**  
**CE Program Actual Profit/Loss Compared with Budgeted Profit/Loss**  
**September 30, 2025**

|                           | <b>Actual<br/>Profit/Loss</b> | <b>Budgeted Profit</b> | <b>Difference</b> |
|---------------------------|-------------------------------|------------------------|-------------------|
| <b>Connect4Success</b>    | (6,267.54)                    | 21,901.00              | (28,168.54)       |
| <b>EFDA</b>               | 75,779.04                     | 23,410.00              | 52,369.04         |
| <b>MERIT</b>              | (61.94)                       | (964.00)               | 902.06            |
| <b>Travel &amp; Learn</b> | (2,512.38)                    | 6,000.00               | (8,512.38)        |
| <b>CE Other (BS/NO)</b>   | (33,151.65)                   | 9,670.00               | (42,821.65)       |
|                           | 33,785.53                     | 60,017.00              | (26,231.47)       |

**General Administrative:** We received dividends of \$241,902.00 as of September 2025 from MDIS, we budgeted \$130,000. A total of \$217,456.00 was received for 2024.

**Investment Accounts:** Our investment accounts had a gain of \$38,498.19 in dividends and had an unrealized gain on investments of \$104,807.72 through September 30, 2025.

Overall, income collected is 88% of budget expectations for the year.

**Expenses:** Overall expenses are at 75% of budget expectations for the year.

*Separation of operational, restricted reserve, Relief Fund and other funds, the ED shall not project the use of monies in other funds to balance the activities of another. The restricted reserve has a defined purpose and shall not be used otherwise and the same applies to the Relief Fund. Other funds would refer to unrestricted reserve funds available to the association in time of extreme need and available only upon approval of the entire board. Item 4 gives an alternative that will be explored then. Cash Flow depicts monies readily available in the operating fund to cover the day-to-day expenses of providing services. It is to be carefully monitored by constant surveillance of income vs expenses and review of monthly income and expense reports. Predictions must be made monthly to assure that the income stream aligns with the budgeted income projections. Disclosure of planning assumptions in financial budgeting and ... any remaining part of (the) fiscal year, it is the responsibility of the ED to disclose to the finance committee and the entire board any assumptions made when developing the annual budget for the ensuing fiscal year and to make at least quarterly projections as to the outcome of those assumptions in the specified monitoring reports.*

Evidence: No funds were transferred from the reserve funds during this reporting period.

**Additionally, the ED shall not:**

**a. Fail to maintain daily liquidity requirements in the operating fund of the Missouri Dental Association.**

*Interpretation: Fail to maintain daily liquidity requirements: The necessity to maintain enough funds to pay the daily operating expenses of the association without dipping into reserves.*

Evidence: Daily operating expenses are currently within budgeted expectations. The budget is reviewed monthly to determine if any cost and/or income expectations should be changed to maintain future liquidity.

**(i) Fail to maintain a cash reserve fund balance of a minimum 35% of the association's annual operating budget (excluding grant and assessment funds); and furthermore, the ED shall not fail to maintain within the reserve funds a minimum of 10% of the operating budget in FDIC insured accounts.**

*Interpretation: The MDA Board determines the minimum reserve fund balance. It has been determined that our reserves should be no less than 35% of budget minus grants received. This calculation was amended in 2011.*

Evidence: Reserve funds currently total \$3,055,563.93. These cash funds include \$2,652,884.82 in mutual funds and \$402,907.47 in money market accounts. After grant income is removed, MDA has a projected income budget of \$1,636,487.00. Current reserves total 187% of the association's annual operating budget.

**b. Fail to comply with the MDA Investment Policy as stated in Executive Limitations Policy 1.2 (9)**

*Interpretation: Our current operating budget is in excess of \$1,540,000 which would indicate that there should be over \$110,000 in FDIC insured accounts.*

Evidence: We exceed each of these requirements.

We currently maintain 2 money market accounts totaling \$402,907.47. This well exceeds the \$163,649 minimum of this policy.

**(2) Fail to use an accrual basis of accounting for budgeted and actual finances.**

*Interpretation: (Not changed since the last report) This was changed by board action to use "accrual" basis for accounting purposes. Revenue is recorded in the period when it's earned whether or not payment has been received – it is recorded in accounts receivable until actually received. Expenses are recorded when they're actually incurred rather than when paid and are recorded as accounts payable until actually paid. This can best be represented such as payroll, vacation time and sick time, depreciation – items for which you will never receive an invoice but are liable for.*

**(3) (shall not) Plan the expenditure in any fiscal year or remaining part of any fiscal year of more funds than are conservatively projected to be received.**

*Interpretation: Present a balanced budget using conservative revenue projections. Constantly monitor income to assure adequate to cover projected expenditures and if necessary, delay purchases or postpone trips.*

Evidence: Daily operating expenses are currently within budgeted expectations.

**(4) (shall not) Indebt the organization in an amount greater than can be repaid by certain, otherwise unencumbered revenues within 60 days.**

*Interpretation: Cash flow must be monitored to ensure there are sufficient funds to pay fixed expenses such as salaries, utilities, etc. If cash flow becomes an issue at the end of the calendar year, unrestricted reserves can be tapped if dues income for the following year will be available within 60 days and the reserves can be replenished.*

Evidence: There are sufficient funds available to cover fixed expenses.

**(5) (shall not) Remove monies from reserve funds; or use any restricted reserves without prior notification of the board.**

*Interpretation: Remove monies from reserve funds. The only time monies would be removed from reserve funds are to cope with the issue of cash flow to meet fixed expenses, but this has not been necessary. Shifting of funds would have to be approved by the Finance Committee.*

Evidence: At the April 2023 Board meeting, it was approved to renovate the vacant lease space in the basement. This space has become a training center for dental assistants. In July 2023, the money market at First Mid Bank and Trust was moved from the money market account to general checking to cover the cost of this renovation. The renovation is complete. All invoices for the training center have been paid in full.

**(6) (shall not) Conduct inter-fund shifting in amounts greater than can be restored to a condition of discrete fund balances by certain, otherwise unencumbered revenues within 30 days.**

*Interpretation: Inter-fund shifting moving monies from operational fund to unrestricted reserves is done to realize the most interest revenue.*

Evidence: Moving money from the unrestricted account to the operational account will only be done within the limits of the amount of money placed in the unrestricted reserves (money market) from the operational account.

**(7) Fail to settle payroll and debts in a timely manner.**

*Interpretation: Payroll would include payroll and all associated encumbrances such as payment of FICA, payroll deductions and matching pension amounts. Debts would be all*

*other payables incurred through the operation of the association. Timely manner would be within acceptable limits established by the creditor, on schedule payment of salaries.*

Evidence: All have been settled in a timely manner.

**(8) (shall not) Allow tax payments or other government ordered payments or filings to be overdue or inaccurately filed.**

*Interpretation: tax payments and other government ordered payments or filings (such as ethics commission reports) are filed on time.*

Evidence: Payroll tax filings are completed by the company that does the association payroll and are electronically filed and paid. This ensures that the filings are on time and accurate.

**(9) Fail to depreciate fixed assets according to the IRS Modified Accelerated Cost Recovery System (MACRS) method over the applicable life of the asset.**

*Interpretation: The assets of the building will be depreciated over time according to the MACRS method.*

Evidence: The new building fixed assets have been inventoried and given to the accountant and are being depreciated properly.

**(10) (shall not) Acquire, encumber or dispose of real property.**

*Interpretation: Real Property shall be real estate (land and buildings) and not what could be interpreted as personal property (furniture, computers, etc.)*

Evidence: Real Property has not been acquired, encumbered, or disposed of.

**(11) Fail to aggressively pursue receivables after a reasonable grace period:**

*Interpretation: Other than payments due to the association for advertising, there are very few receivables. Reasonable grace period is interpreted to be 60 days.*

Evidence: The September 30, 2025 Balance Sheet shows an Accounts Receivable balance of \$3,616.64. All receivables are current. Receivables are reviewed monthly to identify late payments. Staff is then assigned responsibility to pursue payments for outstanding debts.

**(12) (shall not) Provide less for board prerogatives during the year than is set forth in the "Cost of Governance" policy.**

*Interpretation: (No change) these items are considered fixed expenses when developing the budget, therefore the board would be responsible for determining where additional funding would be taken from should the need arise.*

Evidence: Appropriate funds have been budgeted for board activities, including board meetings, strategic planning, committee ad hocs and board processes.

**(13) Fail to provide monies for the general operation of the House of Delegates.**

*Interpretation: Provide monies in the budget for the following year's House expenses and it would be the responsibility of the Speaker and the Secretary of the House to determine whether enough has been placed in the budget. General Operations would include the mandated directives of the House such as the Friday evening social function as well as the cost for providing space and materials for the House to operate. This does not include costs for functions of the various components and their caucuses other than the room necessary for their meeting.*

Evidence: Appropriate funds have been budgeted for House of Delegates activities.

**(14) Fail to convene a finance committee composed of the President, President-Elect, Treasurer and any other persons that he/she deems appropriate for consultation on the budget, related matters and unbudgeted expenditures in excess of \$5,000.**

*Interpretation: Convene a Finance Committee to discuss the proposed staff budget in a manner that will allow sufficient time for staff to prepare a final proposal to present to the BOT at their regularly scheduled summer meeting.*

Evidence: The MDA staff keeps the Treasurer up to date on necessary transactions related to funds. The Finance Committee meets to determine the budget to present to Board and each year.

**(15) Fail to have the approval of the Finance Committee prior to making an unbudgeted expenditure in excess of \$5,000.**

*Interpretation: Anytime the ED wants to make a purchase or fund a project in excess of \$5,000, the Finance Committee must be convened by a judicious means to discuss the expenditure and either approve or disapprove. The decision is binding unless the ED appeals the decision to the entire board and the board rules otherwise.*

Additionally, the ED shall not

- a. **Fail to give the Finance Committee 7 days to reply before making an unbudgeted expenditure in excess of \$5000.**

*Interpretation: The ED must give all members of the Finance Committee ample opportunity to reply to the request, which being a minimum of 72 hours after making every concerted effort to seek a reply.*

- b. **Fail to appeal to the Board if the majority of the Finance Committee rejects the recommendation. The Board shall have 7 days to respond; all non-responses will be considered to favor recommendation.**

Interpretation: Should the Finance Committee reject the request; the ED has the option to appeal the decision to the entire board. Every effort must be expended to receive a reply from each board member; if no reply is made within 7days from any board member, it shall be considered a positive vote.

Evidence: There have been no unbudgeted funds over \$5,000 expended during this period.

**(16) Fail to have the approval of the Finance Committee prior to allocating unbudgeted income in excess of \$5,000.**

Interpretation: The ED must have the approval of the Finance Committee prior to allocating unbudgeted income toward a purchase, investment, etc. that is in excess of \$5000.

Additionally, the ED shall not:

- a. **Fail to give the Finance Committee 7 days to reply before allocating unbudgeted income in excess of \$5,000.**

Interpretation: The ED must give all members of the Finance Committee ample opportunity to reply to the request, that being a minimum of 72 hours after making every concerted effort to seek a reply.

- b. **Fail to appeal to the Board if the majority of the Finance Committee rejects the recommendation. The Board shall have 7 days to respond; all non-responses will be considered to favor the recommendation.**

Interpretation: Should the Finance Committee reject the request, the ED has the option to appeal the decision to the entire board. Every effort must be expended to receive a reply from each board member; if no reply is made within 7days from any board member, it shall be considered a positive vote.

Evidence: No unbudgeted income in excess of \$5,000 was spent during this time period.

**(17) Fail to confer with the board annually regarding possible additional principal payments towards the MDA building loan.**

Interpretation: After the auditor presents the final audit to the Board, the Board will decide if an additional mortgage payment should be made.

Evidence: The board approved at the August 2016 Board of Trustees meeting to pay off the building loan.

**(18) Fail to review the IRS 990 form with the Financial Director and MDA Treasurer prior to signing and submitting to the IRS by annual deadline.**

**(20) Fail to comply with the MDA Dues Statement Policy:**

## **Dues Statement Policy**

1. The MDA dues statement will include one section listing Mandatory Dues (ADA, MDA, Component) and one section listing Voluntary Suggestions. One "Total Suggested Payment" amount containing both mandatory and voluntary will be listed at the bottom. No voluntary contribution amounts will appear in the mandatory amounts section.
2. Only groups/subsidiaries that fall under the umbrella of the ADA, MDA and/or Components will be included in the voluntary suggested contributions. These organizations/entities are: ADA Foundation, ADPAC, MODentPAC, MDA Foundation, MDA Well Being Foundation or subsequent foundations and any component dental foundations.

I certify that I am in compliance with this Limitation.

**Vicki Wilbers, Executive Director, October 2025**

5:11 PM

10/07/25

Accrual Basis

## Missouri Dental Association

## Balance Sheet

As of September 30, 2025

|                                                                                 | Sep 30, 25          |
|---------------------------------------------------------------------------------|---------------------|
| <b>ASSETS</b>                                                                   |                     |
| <b>Current Assets</b>                                                           |                     |
| Checking/Savings                                                                |                     |
| 105100 · Petty Cash                                                             | 50.00               |
| 105150 · General Checking (105150)                                              | 96,298.21           |
| 105200 · MERIT - Checking (105200)                                              | 31,366.12           |
| <b>Total Checking/Savings</b>                                                   | <b>127,714.33</b>   |
| Accounts Receivable                                                             |                     |
| 115000 · Accounts Receivable (115000)                                           | 3,616.64            |
| <b>Total Accounts Receivable</b>                                                | <b>3,616.64</b>     |
| <b>Other Current Assets</b>                                                     |                     |
| Inventory Asset                                                                 | -179.98             |
| 110000 · Reserve Accounts (110000)                                              |                     |
| 1100A1 · American Funds (1100A1)                                                |                     |
| 1100A10 · SmallCap World Fund                                                   | 55,883.36           |
| 1100A11 · The Bond Fund of America                                              | 64,419.82           |
| 1100A12 · Intermediate Bond Fund of Ameri                                       | 68,371.41           |
| 1100A2 · Balanced Fund (1100A2)                                                 | 421,090.81          |
| 1100A4 · Capital World Growth and Income (1100A4)                               | 157,957.91          |
| 1100A8 · New Perspective (1100A8)                                               | 52,857.63           |
| 1100A9 · American Washington Mutual Inve                                        | 448,771.70          |
| <b>Total 1100A1 · American Funds (1100A1)</b>                                   | <b>1,269,352.64</b> |
| 1100AB1 · LPL Financials                                                        | 504,846.34          |
| 1100AC1 · LPL Financials - US Treasury B1                                       | 536,875.33          |
| 1100AD1 · LPL Financials - US Treasury B2 (ERC Funds - Hold until audit peri... | 217,884.82          |
| 1100B0 · Lord Abbett (1100B0)                                                   |                     |
| 1100B2 · Lord Abbett Short Duration Inc (1100B2)                                | 123,697.33          |
| <b>Total 1100B0 · Lord Abbett (1100B0)</b>                                      | <b>123,697.33</b>   |
| 1100H0 · River Region Credit Union                                              | 227,636.28          |
| 1100J0 · Mid America Bank MM                                                    | 175,271.19          |
| <b>Total 110000 · Reserve Accounts (110000)</b>                                 | <b>3,055,563.93</b> |
| <b>Total Other Current Assets</b>                                               | <b>3,055,383.95</b> |
| <b>Total Current Assets</b>                                                     | <b>3,186,714.92</b> |
| <b>Fixed Assets</b>                                                             |                     |
| 120100 · MDA FIXED ASSET                                                        |                     |
| 120140 · New Land & Building (120140)                                           | 456,210.59          |
| 120145 · Furniture & Equip - New Bldg (120145)                                  | 158,183.50          |
| 120200 · Building (120200)                                                      | 1,199,315.82        |
| 120250 · Equipment & Automobile (120250)                                        | 187,068.29          |
| 120300 · Less-Accum. Depreciation (120300)                                      | -997,111.82         |
| <b>Total 120100 · MDA FIXED ASSET</b>                                           | <b>1,003,666.38</b> |
| 120270 · ROU Assets                                                             | 5,146.20            |
| 120500 · Accumulated Amortization                                               | -915.86             |
| <b>Total Fixed Assets</b>                                                       | <b>1,007,896.72</b> |
| <b>Other Assets</b>                                                             |                     |
| 125150 · Prepaid Expenses (125150)                                              | 4,859.96            |
| 125200 · Prepaid Insurance (125200)                                             | 2,547.00            |
| 125250 · Prepaid Taxes (125250)                                                 | 6,016.00            |
| 130150 · Investment - MDIS (130150)                                             | 1,013,401.90        |
| <b>Total Other Assets</b>                                                       | <b>1,026,824.86</b> |
| <b>TOTAL ASSETS</b>                                                             | <b>5,221,436.50</b> |

## Missouri Dental Association

## Balance Sheet

As of September 30, 2025

|                                                 | Sep 30, 25          |
|-------------------------------------------------|---------------------|
| <b>LIABILITIES &amp; EQUITY</b>                 |                     |
| <b>Liabilities</b>                              |                     |
| <b>Current Liabilities</b>                      |                     |
| <b>Accounts Payable</b>                         |                     |
| 201500 · Accounts Payable (201500)              | -738.26             |
| <b>Total Accounts Payable</b>                   | -738.26             |
| <b>Credit Cards</b>                             |                     |
| 201520 · Business Card (201520)                 |                     |
| BOA - Melissa                                   | -31.49              |
| US Bank - Denise                                | 96.00               |
| <b>Total 201520 · Business Card (201520)</b>    | 64.51               |
| <b>Total Credit Cards</b>                       | 64.51               |
| <b>Other Current Liabilities</b>                |                     |
| 201513 · Lease Payable (201513)                 | 3,269.68            |
| 201513A · ROU Lease Payable-Current             | 960.66              |
| 201650 · ADPAC Payable (201650)                 | 100.00              |
| 201700 · PAC Clearing Account (201700)          | 563.17              |
| 201800 · Accrued Vacation (201800)              | 18,298.15           |
| 201950 · Cafeteria Plan - AFLAC (201950)        | 57.28               |
| 202000 · Cafeteria Plan - FSA/Dep Care (202000) | 116.78              |
| 202010 · Cafeteria Plan - United Way (202010)   | 60.00               |
| 202020 · 202020 - Cafeteria Plan - Life         | 676.00              |
| 202230 · 401(K) Employee Contrib (202230)       | -14.34              |
| 205120 · ADA Dues (205120)                      | 10,865.21           |
| 205180 · CDS Dues (205180)                      | 47.95               |
| 205200 · NEDS Dues (205200)                     | 8.17                |
| 205220 · NWDS Dues (205220)                     | 7.92                |
| 205240 · SEDS Dues (205240)                     | 160.30              |
| 205260 · SWDS Dues (205260)                     | 50.75               |
| 205280 · GSLDS Dues (205280)                    | 3,488.52            |
| 205286 · Give Kids a Smile (GKAS)               | 100.80              |
| 205300 · GKCDs Dues (205300)                    | 821.08              |
| 205320 · GSDS Dues (205320)                     | 357.81              |
| 205325 · GSDS Foundation (205325)               | 8.33                |
| <b>Total Other Current Liabilities</b>          | 40,004.22           |
| <b>Total Current Liabilities</b>                | 39,330.47           |
| <b>Total Liabilities</b>                        | 39,330.47           |
| <b>Equity</b>                                   |                     |
| 294000 · Retained Earnings (294000)             | 4,672,894.40        |
| 295500 · Restricted Earnings For MERIT (295500) | 30,569.14           |
| Net Income                                      | 478,642.49          |
| <b>Total Equity</b>                             | 5,182,106.03        |
| <b>TOTAL LIABILITIES &amp; EQUITY</b>           | <b>5,221,436.50</b> |

| Missouri Dental Association                |                     |                        |                        |                       |             |
|--------------------------------------------|---------------------|------------------------|------------------------|-----------------------|-------------|
| Income Statement                           |                     |                        |                        |                       |             |
| September 30, 2025                         |                     |                        |                        |                       |             |
|                                            | Current Month       | Year to Date           | 2025 Annual Budget     | Budget Variance       | Budget %    |
| <b>INCOME</b>                              |                     |                        |                        |                       |             |
| <b>Communications</b>                      |                     |                        |                        |                       |             |
| Advertising                                | \$ 6,350.00         | \$ 42,915.00           | \$ 60,500.00           |                       |             |
| Component Assistance                       | \$ 375.00           | \$ 1,525.00            | \$ 1,200.00            |                       |             |
| Grant Income                               | \$ -                | \$ -                   | \$ -                   |                       |             |
| Sponsorships                               | \$ -                | \$ -                   | \$ 8,000.00            |                       |             |
| Subscriptions                              | \$ -                | \$ 1,300.00            | \$ 1,275.00            |                       |             |
| <b>Total Communications Income</b>         | <b>\$ 6,725.00</b>  | <b>\$ 45,740.00</b>    | <b>\$ 70,975.00</b>    | <b>\$ (25,235.00)</b> | <b>64%</b>  |
| <b>Continuing Education/Programs</b>       |                     |                        |                        |                       |             |
| <b>Connect4Success</b>                     |                     |                        |                        |                       |             |
| Meals and Entertainment                    | \$ -                | \$ 3,235.00            | \$ 900.00              |                       |             |
| Registration Fees                          | \$ -                | \$ 39,089.00           | \$ 45,964.00           |                       |             |
| Sponsorships                               | \$ -                | \$ 56,650.00           | \$ 65,000.00           |                       |             |
| <b>Subtotal Connect4Success</b>            | <b>\$ -</b>         | <b>\$ 98,974.00</b>    | <b>\$ 111,864.00</b>   | <b>\$ (12,890.00)</b> | <b>88%</b>  |
| <b>EFDA</b>                                |                     |                        |                        |                       |             |
| Course Fees                                | \$ 22,794.00        | \$ 180,155.00          | \$ 194,750.00          |                       |             |
| Dental Assisting Book/Kits                 | \$ -                | \$ 100.00              | \$ -                   |                       |             |
| Licensing Fees                             | \$ -                | \$ 3,775.00            | \$ 1,400.00            |                       |             |
| Donation                                   | \$ -                | \$ -                   |                        |                       |             |
| Grant Income                               | \$ -                | \$ -                   |                        |                       |             |
| Sponsorships                               |                     | \$ -                   | \$ -                   |                       |             |
| <b>Subtotal EFDA</b>                       | <b>\$ 22,794.00</b> | <b>\$ 184,030.00</b>   | <b>\$ 196,150.00</b>   | <b>\$ (12,120.00)</b> | <b>94%</b>  |
| <b>MERIT</b>                               |                     |                        |                        |                       |             |
| Interest Income                            | \$ 3.86             | \$ 34.71               | \$ 36.00               |                       |             |
| Registration Fees                          | \$ -                | \$ 3,285.00            | \$ 3,125.00            |                       |             |
| Sponsorships                               | \$ -                | \$ -                   | \$ 250.00              |                       |             |
| <b>Subtotal MERIT</b>                      | <b>\$ 3.86</b>      | <b>\$ 3,319.71</b>     | <b>\$ 3,411.00</b>     | <b>\$ (91.29)</b>     | <b>97%</b>  |
| <b>Travel &amp; Learn</b>                  |                     |                        |                        |                       |             |
| Registration/Room Fees                     | \$ -                | \$ -                   | \$ 500.00              |                       |             |
| Sponsorships                               | \$ -                | \$ 8,000.00            | \$ 6,000.00            |                       |             |
| <b>Subtotal Travel &amp; Learn</b>         | <b>\$ -</b>         | <b>\$ 8,000.00</b>     | <b>\$ 6,500.00</b>     | <b>\$ 1,500.00</b>    | <b>123%</b> |
| <b>Virtual CE Meetings</b>                 |                     |                        |                        |                       |             |
| Registration Fees                          | \$ -                | \$ -                   | \$ -                   |                       |             |
| Sponsorships                               | \$ -                | \$ -                   | \$ -                   |                       |             |
| <b>Subtotal CE Virtual Meetings</b>        | <b>\$ -</b>         | <b>\$ -</b>            | <b>\$ -</b>            | <b>\$ -</b>           | <b>100%</b> |
| <b>Continuing Education - Other</b>        |                     |                        |                        |                       |             |
| CE Accreditation                           | \$ 250.00           | \$ 1,625.00            | \$ 4,500.00            |                       |             |
| Course Fees - Basic Skills/Nitrous         | \$ 289.00           | \$ 21,516.00           | \$ 15,750.00           |                       |             |
| Study Club Affiliation                     | \$ -                | \$ -                   | \$ 900.00              |                       |             |
| <b>Subtotal Other Continuing Education</b> | <b>\$ 539.00</b>    | <b>\$ 23,141.00</b>    | <b>\$ 21,150.00</b>    | <b>\$ 1,991.00</b>    | <b>109%</b> |
| <b>Total Continuing Education/Programs</b> | <b>\$ 23,336.86</b> | <b>\$ 317,464.71</b>   | <b>\$ 339,075.00</b>   | <b>\$ (21,610.29)</b> | <b>94%</b>  |
| <b>General Administrative</b>              |                     |                        |                        |                       |             |
| Dividends (MDIS)                           | \$ -                | \$ 241,902.00          | \$ 130,000.00          |                       |             |
| Dues                                       | \$ 8,884.83         | \$ 665,644.39          | \$ 750,565.00          | \$ (84,920.61)        | 89%         |
| Interest Income                            | \$ 509.65           | \$ 4,713.22            | \$ 4,400.00            |                       |             |
| Meals & Entertainment                      | \$ -                | \$ -                   | \$ -                   |                       |             |
| Miscellaneous Income                       | \$ -                | \$ 0.20                | \$ 200.00              |                       |             |
| Professional Services                      | \$ -                | \$ 1,000.00            | \$ 46,000.00           |                       |             |
| Rebates/Refunds                            | \$ -                | \$ 12,453.94           | \$ 30,500.00           |                       |             |
| Rent                                       | \$ 3,392.00         | \$ 34,331.00           | \$ 60,522.00           |                       |             |
| Royalties                                  | \$ 3,904.20         | \$ 65,332.26           | \$ 50,000.00           |                       | 131%        |
| Sales                                      | \$ 840.00           | \$ 4,700.00            | \$ 5,600.00            |                       |             |
| Sale of Equipment                          | \$ -                | \$ -                   | \$ -                   |                       |             |
| Service Fee Agreement                      | \$ 5,000.00         | \$ 39,750.00           | \$ 53,000.00           |                       |             |
| Sponsorships                               | \$ -                | \$ -                   | \$ -                   |                       |             |
| <b>Total General Administrative</b>        | <b>\$ 22,530.68</b> | <b>\$ 1,069,827.01</b> | <b>\$ 1,130,787.00</b> | <b>\$ (60,959.99)</b> | <b>95%</b>  |

| Missouri Dental Association        |               |                 |                    |                 |          |
|------------------------------------|---------------|-----------------|--------------------|-----------------|----------|
| Income Statement                   |               |                 |                    |                 |          |
| September 30, 2025                 |               |                 |                    |                 |          |
|                                    | Current Month | Year to Date    | 2025 Annual Budget | Budget Variance | Budget % |
| <b>Board of Trustees</b>           |               |                 |                    |                 |          |
| <i>Sponsorships</i>                | \$ -          | \$ 5,500.00     | \$ 12,000.00       |                 |          |
| <b>Subtotal Board of Trustees</b>  | \$ -          | \$ 5,500.00     | \$ 12,000.00       | \$ (6,500.00)   | 46%      |
| <b>House of Delegates</b>          |               |                 |                    |                 |          |
| <i>Meals &amp; Entertainment</i>   | \$ -          | \$ 1,390.00     | \$ 2,650.00        |                 |          |
| <i>Sponsorships</i>                | \$ 2,000.00   | \$ 10,000.00    | \$ 12,000.00       |                 |          |
| <b>Subtotal House of Delegates</b> | \$ 2,000.00   | \$ 11,390.00    | \$ 14,650.00       | \$ (3,260.00)   | 78%      |
| <b>6th District</b>                |               |                 |                    |                 |          |
| <i>Registration Fees</i>           |               | \$ -            | \$ -               |                 |          |
| <b>Subtotal 6th District</b>       | \$ -          | \$ -            | \$ -               | \$ -            |          |
| <b>Total Governance</b>            | \$ 2,000.00   | \$ 16,890.00    | \$ 26,650.00       | \$ (9,760.00)   | 63%      |
| <b>Legislative</b>                 |               |                 |                    |                 |          |
| <i>Grant Income</i>                | \$ -          | \$ 67,500.00    | \$ 85,000.00       |                 |          |
| <i>Meals &amp; Entertainment</i>   | \$ -          | \$ -            | \$ -               |                 |          |
| <i>Sponsorships</i>                | \$ -          | \$ -            | \$ 1,000.00        |                 |          |
| <b>Total Legislative</b>           | \$ -          | \$ 67,500.00    | \$ 86,000.00       | \$ (18,500.00)  | 78%      |
| <b>Public Education</b>            |               |                 |                    |                 |          |
| <i>Grant Income</i>                | \$ -          | \$ -            | \$ 59,500.00       |                 |          |
| <b>Total Public Education</b>      | \$ -          | \$ -            | \$ 59,500.00       | \$ (59,500.00)  | 0%       |
| <b>Recruitment/Retention</b>       |               |                 |                    |                 |          |
| <i>Grant Income</i>                | \$ -          | \$ -            | \$ -               |                 |          |
| <i>Meals &amp; Entertainment</i>   | \$ -          | \$ -            | \$ -               |                 |          |
| <i>Sponsorships</i>                | \$ 35,500.00  | \$ 54,500.00    | \$ 68,000.00       |                 |          |
| <b>Total Recruitment/Retention</b> | \$ 35,500.00  | \$ 54,500.00    | \$ 68,000.00       | \$ (13,500.00)  | 80%      |
| <b>Total Income</b>                | \$ 90,092.54  | \$ 1,571,921.72 | \$ 1,780,987.00    | \$ (209,065.28) | 88%      |
| <b>EXPENSES</b>                    |               |                 |                    |                 |          |
| <b>Communications</b>              |               |                 |                    |                 |          |
| <i>Art/Graphics</i>                | \$ -          | \$ (209.00)     | \$ 200.00          |                 |          |
| <i>Consultant</i>                  | \$ -          | \$ -            | \$ -               |                 |          |
| <i>Copies &amp; Print</i>          | \$ -          | \$ 7,465.78     | \$ 11,700.00       |                 |          |
| <i>Dues &amp; Subscriptions</i>    | \$ 133.99     | \$ 4,694.71     | \$ 22,903.75       |                 |          |
| <i>Grant Expense</i>               | \$ -          | \$ -            | \$ -               |                 |          |
| <i>Legal</i>                       | \$ -          | \$ -            | \$ -               |                 |          |
| <i>Postage</i>                     | \$ -          | \$ 3,009.90     | \$ 4,000.00        |                 |          |
| <i>Prizes &amp; Giveaways</i>      | \$ -          | \$ -            | \$ -               |                 |          |
| <i>Salaries</i>                    | \$ 6,562.28   | \$ 59,718.50    | \$ 94,021.00       |                 |          |
| <i>Stipends/Per Diems</i>          | \$ 1,400.00   | \$ 2,800.00     | \$ 4,150.00        |                 |          |
| <i>Supplies</i>                    | \$ -          | \$ 140.45       | \$ 763.00          |                 |          |
| <i>Telephone</i>                   | \$ -          | \$ -            | \$ 720.00          |                 |          |
| <b>Total Communications</b>        | \$ 8,096.27   | \$ 77,620.34    | \$ 138,457.75      | \$ 60,837.41    | 56%      |
| <b>Continuing Education</b>        |               |                 |                    |                 |          |
| <b>Connect4Success</b>             |               |                 |                    |                 |          |
| <i>Copies &amp; Print</i>          | \$ -          | \$ 436.55       | \$ 750.00          |                 |          |
| <i>Hotel Expenses</i>              | \$ -          | \$ 3,031.25     | \$ 2,600.00        |                 |          |
| <i>Meals &amp; Entertainment</i>   | \$ 260.00     | \$ 34,521.03    | \$ 27,350.00       |                 |          |
| <i>Postage</i>                     | \$ -          | \$ 3,037.48     | \$ 875.00          |                 |          |
| <i>Prizes &amp; Giveaways</i>      | \$ -          | \$ 827.66       | \$ 200.00          |                 |          |
| <i>Salaries</i>                    | \$ 1,094.29   | \$ 27,302.13    | \$ 19,588.00       |                 |          |
| <i>Speaker Expenses</i>            | \$ -          | \$ 34,561.37    | \$ 36,400.00       |                 |          |
| <i>Staff Travel</i>                | \$ -          | \$ 457.34       | \$ 1,900.00        |                 |          |
| <i>Supplies</i>                    | \$ -          | \$ 1,066.73     | \$ 300.00          |                 |          |
| <b>Subtotal Connect4Success</b>    | \$ 1,354.29   | \$ 105,241.54   | \$ 89,963.00       | \$ (15,278.54)  | 117%     |

| Missouri Dental Association         |                     |                      |                      |                       |             |
|-------------------------------------|---------------------|----------------------|----------------------|-----------------------|-------------|
| Income Statement                    |                     |                      |                      |                       |             |
| September 30, 2025                  |                     |                      |                      |                       |             |
|                                     |                     |                      |                      |                       |             |
|                                     | Current Month       | Year to Date         | 2025 Annual Budget   | Budget Variance       | Budget %    |
| <b>EFDA</b>                         |                     |                      |                      |                       |             |
| Consultant                          | \$ -                | \$ -                 | \$ -                 |                       |             |
| Dues & Subscriptions                | \$ 470.00           | \$ 1,100.00          | \$ 3,000.00          |                       |             |
| Gifts and Contributions             | \$ -                | \$ -                 | \$ 200.00            |                       |             |
| Insurance                           | \$ -                | \$ -                 | \$ 3,000.00          |                       |             |
| Furniture & Equipment               | \$ -                | \$ 1,059.85          | \$ 1,000.00          |                       |             |
| Legal                               | \$ 1,704.00         | \$ 3,775.00          | \$ 800.00            |                       |             |
| Meals & Entertainment               | \$ 420.01           | \$ 1,953.48          | \$ 3,380.00          |                       |             |
| Miscellaneous                       | \$ -                | \$ -                 | \$ -                 |                       |             |
| Postage                             | \$ 133.79           | \$ 2,089.32          | \$ 750.00            |                       |             |
| Repairs & Maintenance               | \$ -                | \$ 120.21            | \$ -                 |                       |             |
| Salaries                            | \$ 3,096.02         | \$ 30,498.60         | \$ 80,310.00         |                       |             |
| Speaker Expenses                    | \$ -                | \$ -                 | \$ -                 |                       |             |
| Staff Travel                        | \$ -                | \$ -                 | \$ 1,000.00          |                       |             |
| Stipends/Per Diems                  | \$ 6,000.00         | \$ 37,000.00         | \$ 43,700.00         |                       |             |
| Supplies                            | \$ 9,377.88         | \$ 30,654.50         | \$ 35,600.00         |                       |             |
| Telephone                           | \$ -                | \$ -                 | \$ -                 |                       |             |
| Volunteer Travel                    | \$ -                | \$ -                 | \$ -                 |                       |             |
| <b>Subtotal EFDA</b>                | <b>\$ 21,201.70</b> | <b>\$ 108,250.96</b> | <b>\$ 172,740.00</b> | <b>\$ 64,489.04</b>   | <b>63%</b>  |
| <b>MERIT</b>                        |                     |                      |                      |                       |             |
| Copies & Print                      | \$ -                | \$ 89.60             | \$ -                 |                       |             |
| Meals & Entertainment               | \$ -                | \$ 677.37            | \$ 750.00            |                       |             |
| Room Rental                         | \$ -                | \$ 300.00            | \$ 300.00            |                       |             |
| Speaker Expenses                    | \$ -                | \$ 1,000.00          | \$ 2,050.00          |                       |             |
| Staff Project Management            | \$ -                | \$ 1,000.00          | \$ 1,000.00          |                       |             |
| Supplies                            | \$ -                | \$ -                 | \$ -                 |                       |             |
| Volunteer Travel                    | \$ -                | \$ 314.68            | \$ 275.00            |                       |             |
| <b>Subtotal MERIT</b>               | <b>\$ -</b>         | <b>\$ 3,381.65</b>   | <b>\$ 4,375.00</b>   | <b>\$ 993.35</b>      | <b>77%</b>  |
| <b>Travel &amp; Learn</b>           |                     |                      |                      |                       |             |
| Copies & Print                      | \$ -                | \$ -                 | \$ -                 |                       |             |
| Salaries                            | \$ -                | \$ 10,262.38         | \$ -                 |                       |             |
| A/V & Rental                        | \$ -                | \$ 250.00            | \$ 500.00            |                       |             |
| Staff Travel                        | \$ -                | \$ -                 | \$ -                 |                       |             |
| <b>Subtotal Travel &amp; Learn</b>  | <b>\$ -</b>         | <b>\$ 10,512.38</b>  | <b>\$ 500.00</b>     | <b>\$ (10,012.38)</b> | <b>100%</b> |
| <b>CE Virtual Events</b>            |                     |                      |                      |                       |             |
| Dues & Subscriptions                | \$ -                | \$ -                 | \$ -                 |                       |             |
| Salaries                            | \$ -                | \$ -                 | \$ -                 |                       |             |
| Speaker Expenses                    | \$ -                | \$ -                 | \$ -                 |                       |             |
| <b>Subtotal CE Virtual Meetings</b> | <b>\$ -</b>         | <b>\$ -</b>          | <b>\$ -</b>          | <b>\$ -</b>           | <b>0%</b>   |
| <b>Continuing Education - Other</b> |                     |                      |                      |                       |             |
| Copies & Print                      | \$ -                | \$ -                 | \$ -                 |                       |             |
| Cerp Application Fee                | \$ -                | \$ 823.00            | \$ 800.00            |                       |             |
| Furniture & Equipment               | \$ -                | \$ 33,373.62         | \$ -                 |                       |             |
| Legal - Basic Skills/Nitrous        | \$ -                | \$ -                 | \$ -                 |                       |             |
| Meals & Entertainment               | \$ 202.51           | \$ 265.08            | \$ 450.00            |                       |             |
| Program Development                 | \$ -                | \$ -                 | \$ -                 |                       |             |
| Salaries                            | \$ 900.04           | \$ 5,470.24          | \$ 5,480.00          |                       |             |
| Stipends/Per Diems                  | \$ -                | \$ 7,825.00          | \$ 4,500.00          |                       |             |
| Supplies - Basic Skills/Nitrous     | \$ -                | \$ 8,535.71          | \$ 250.00            |                       |             |
| Telephone                           | \$ -                | \$ -                 | \$ -                 |                       |             |
| <b>Subtotal Cont. Ed other</b>      | <b>\$ 1,102.55</b>  | <b>\$ 56,292.65</b>  | <b>\$ 11,480.00</b>  | <b>\$ (44,812.65)</b> | <b>490%</b> |
| <b>Total Continuing Education</b>   | <b>\$ 23,658.54</b> | <b>\$ 283,679.18</b> | <b>\$ 279,058.00</b> | <b>\$ (4,621.18)</b>  |             |
| <b>General Administration</b>       |                     |                      |                      |                       |             |
| Accounting & Auditing               | \$ -                | \$ 15,369.00         | \$ 13,000.00         |                       |             |
| Automobile/Mileage                  | \$ -                | \$ -                 | \$ 150.00            |                       |             |
| Capital Expenses                    | \$ -                | \$ 12,015.00         | \$ -                 |                       |             |
| Consultant                          | \$ -                | \$ 1,800.00          | \$ 3,600.00          |                       |             |
| Copies & Print                      | \$ (74.10)          | \$ 6,293.55          | \$ 6,800.00          |                       |             |

| Missouri Dental Association                  |                     |                      |                      |                      |            |
|----------------------------------------------|---------------------|----------------------|----------------------|----------------------|------------|
| Income Statement                             |                     |                      |                      |                      |            |
| September 30, 2025                           |                     |                      |                      |                      |            |
|                                              | Current Month       | Year to Date         | 2025 Annual Budget   | Budget Variance      | Budget %   |
| <i>Credit Card Processing</i>                | \$ 1,529.88         | \$ 28,852.94         | \$ 47,000.00         |                      |            |
| <i>Dues &amp; Subscriptions</i>              | \$ 1,121.03         | \$ 7,749.02          | \$ 9,594.00          |                      |            |
| <i>Employee Insurance/Benefits</i>           | \$ 2,615.62         | \$ 34,491.06         | \$ 71,265.00         |                      |            |
| <i>Employee Retirement</i>                   | \$ 3,691.92         | \$ 33,199.32         | \$ 53,136.00         |                      |            |
| <i>Equipment Leases</i>                      | \$ (285.84)         | \$ 857.52            | \$ 1,800.00          |                      |            |
| <i>Furniture &amp; Equipment</i>             | \$ 144.66           | \$ 5,360.71          | \$ 5,000.00          |                      |            |
| <i>Gifts &amp; Contributions</i>             | \$ -                | \$ 8,430.40          | \$ 2,000.00          |                      |            |
| <i>Income Tax</i>                            | \$ 1,108.80         | \$ 1,143.50          | \$ 2,000.00          |                      |            |
| <i>Insurance</i>                             | \$ -                | \$ 12,602.00         | \$ 24,700.00         |                      |            |
| <i>Legal</i>                                 | \$ 3,131.50         | \$ 8,954.50          | \$ 5,000.00          |                      |            |
| <i>Meals &amp; Entertainment</i>             | \$ -                | \$ 293.62            | \$ 1,000.00          |                      |            |
| <i>Miscellaneous</i>                         | \$ -                | \$ 5,737.49          | \$ 500.00            |                      |            |
| <i>Payroll Expenses and Taxes</i>            | \$ 5,226.85         | \$ 46,806.82         | \$ 66,500.00         |                      |            |
| <i>Postage</i>                               | \$ 129.40           | \$ 1,960.77          | \$ 4,000.00          |                      |            |
| <i>Prizes &amp; Giveaways</i>                | \$ -                | \$ -                 | \$ 150.00            |                      |            |
| <i>Property Taxes</i>                        | \$ -                | \$ -                 | \$ 35,000.00         |                      |            |
| <i>Repairs &amp; Maintenance</i>             | \$ 2,370.56         | \$ 21,890.56         | \$ 29,560.00         |                      |            |
| <i>Salaries</i>                              | \$ 31,064.60        | \$ 282,823.95        | \$ 404,181.00        |                      |            |
| <i>Staff Education</i>                       | \$ -                | \$ 180.00            | \$ 300.00            |                      |            |
| <i>Staff Travel/Retreat</i>                  | \$ 1,564.43         | \$ 20,520.84         | \$ 25,250.00         |                      |            |
| <i>Supplies</i>                              | \$ 1,227.80         | \$ 4,584.47          | \$ 11,500.00         |                      |            |
| <i>Telephone</i>                             | \$ 557.73           | \$ 6,185.89          | \$ 8,900.00          |                      |            |
| <i>Utilities</i>                             | \$ 1,948.39         | \$ 10,954.55         | \$ 16,060.00         |                      |            |
| <i>Volunteer Travel</i>                      | \$ (75.00)          | \$ -                 | \$ -                 |                      |            |
| <b>Total General Administration Expenses</b> | <b>\$ 56,998.23</b> | <b>\$ 579,057.48</b> | <b>\$ 847,946.00</b> | <b>\$ 268,888.52</b> | <b>68%</b> |
| <b>Governance</b>                            |                     |                      |                      |                      |            |
| <b>6th District</b>                          |                     |                      |                      |                      |            |
| <i>Dues &amp; Subscriptions</i>              | \$ -                | \$ 3,000.00          | \$ 3,000.00          |                      |            |
| <i>Gifts &amp; Contributions</i>             | \$ -                | \$ -                 | \$ -                 |                      |            |
| <i>Meals &amp; Entertainment</i>             |                     | \$ -                 | \$ -                 |                      |            |
| <i>Miscellaneous</i>                         | \$ -                | \$ -                 | \$ -                 |                      |            |
| <i>Per Diems</i>                             | \$ -                | \$ -                 | \$ 3,750.00          |                      |            |
| <i>Staff Travel</i>                          | \$ -                | \$ 350.00            | \$ 1,325.00          |                      |            |
| <i>Supplies</i>                              | \$ -                | \$ -                 | \$ -                 |                      |            |
| <i>Telephone</i>                             | \$ -                | \$ -                 | \$ -                 |                      |            |
| <i>Volunteer Travel (airfare)</i>            | \$ -                | \$ -                 | \$ 4,500.00          |                      |            |
| <b>Subtotal 6th District</b>                 | <b>\$ -</b>         | <b>\$ 3,350.00</b>   | <b>\$ 12,575.00</b>  | <b>\$ 9,225.00</b>   | <b>27%</b> |
| <b>ADA</b>                                   |                     |                      |                      |                      |            |
| <i>Meals &amp; Entertainment</i>             | \$ -                | \$ -                 | \$ 150.00            |                      |            |
| <i>Per Diems</i>                             | \$ -                | \$ 4,785.62          | \$ 22,500.00         |                      |            |
| <i>Salaries</i>                              | \$ 1,779.63         | \$ 8,658.04          | \$ 19,587.00         |                      |            |
| <i>Staff Travel</i>                          | \$ -                | \$ 614.70            | \$ 8,775.00          |                      |            |
| <i>Telephone</i>                             | \$ -                | \$ -                 | \$ -                 |                      |            |
| <i>Volunteer Travel (airfare)</i>            | \$ -                | \$ -                 | \$ 5,250.00          |                      |            |
| <b>Subtotal ADA</b>                          | <b>\$ 1,779.63</b>  | <b>\$ 14,058.36</b>  | <b>\$ 56,262.00</b>  | <b>\$ 42,203.64</b>  | <b>25%</b> |
| <b>Board of Trustees</b>                     |                     |                      |                      |                      |            |
| <i>Consultant</i>                            | \$ 6,822.91         | \$ 11,272.58         | \$ -                 |                      |            |
| <i>Dues &amp; Subscriptions</i>              | \$ -                | \$ 99.00             | \$ -                 |                      |            |
| <i>Gifts &amp; Contributions</i>             | \$ -                | \$ -                 | \$ -                 |                      |            |
| <i>Hotel Expense</i>                         | \$ -                | \$ -                 | \$ -                 |                      |            |
| <i>Legal</i>                                 | \$ -                | \$ 1,177.50          | \$ 1,000.00          |                      |            |
| <i>Meals &amp; Entertainment</i>             | \$ -                | \$ 2,124.48          | \$ 2,200.00          |                      |            |
| <i>Registration Fee</i>                      | \$ -                | \$ 781.88            | \$ -                 |                      |            |
| <i>Salaries</i>                              | \$ 8,739.18         | \$ 39,075.78         | \$ 39,175.00         |                      |            |
| <i>Speaker Expenses</i>                      | \$ -                | \$ -                 | \$ -                 |                      |            |
| <i>Staff Travel</i>                          | \$ -                | \$ 907.73            | \$ -                 |                      |            |
| <i>Stipends/Per Diems</i>                    | \$ 12,279.00        | \$ 26,308.00         | \$ 29,108.00         |                      |            |
| <i>Supplies</i>                              | \$ -                | \$ 36.56             | \$ 90.00             |                      |            |

| Missouri Dental Association                |                     |                      |                      |                       |             |
|--------------------------------------------|---------------------|----------------------|----------------------|-----------------------|-------------|
| Income Statement                           |                     |                      |                      |                       |             |
| September 30, 2025                         |                     |                      |                      |                       |             |
|                                            | Current Month       | Year to Date         | 2025 Annual Budget   | Budget Variance       | Budget %    |
| <i>Telephone</i>                           | \$ -                | \$ -                 | \$ -                 |                       |             |
| <b>Subtotal Board of Trustees</b>          | <b>\$ 27,841.09</b> | <b>\$ 81,783.51</b>  | <b>\$ 71,573.00</b>  | <b>\$ (10,210.51)</b> | <b>114%</b> |
| <b>House of Delegates</b>                  |                     |                      |                      |                       |             |
| <i>Consultant</i>                          | \$ 9,687.50         | \$ 9,687.50          | \$ -                 |                       |             |
| <i>Dues &amp; Subscriptions</i>            | \$ -                | \$ -                 | \$ -                 |                       |             |
| <i>Gifts and Contributions</i>             | \$ -                | \$ 860.51            | \$ 750.00            |                       |             |
| <i>Hotel Expense</i>                       | \$ -                | \$ 3,106.78          | \$ 4,100.00          |                       |             |
| <i>Legal</i>                               | \$ -                | \$ 1,162.00          | \$ 500.00            |                       |             |
| <i>Meals &amp; Entertainment</i>           | \$ -                | \$ 10,438.00         | \$ 10,525.00         |                       |             |
| <i>Prizes and Giveaways</i>                | \$ -                | \$ -                 | \$ -                 |                       |             |
| <i>Registration Fee</i>                    | \$ -                | \$ 781.87            | \$ -                 |                       |             |
| <i>Salaries</i>                            | \$ 1,047.44         | \$ 24,065.23         | \$ 15,670.00         |                       |             |
| <i>Staff Travel</i>                        | \$ -                | \$ 1,134.18          | \$ 350.00            |                       |             |
| <i>Supplies</i>                            | \$ -                | \$ 635.00            | \$ 766.00            |                       |             |
| <i>Volunteer Travel (Students)</i>         | \$ -                | \$ 697.19            | \$ 500.00            |                       |             |
| <b>Subtotal House of Delegates</b>         | <b>\$ 10,734.94</b> | <b>\$ 52,568.26</b>  | <b>\$ 33,161.00</b>  | <b>\$ (19,407.26)</b> | <b>159%</b> |
| <b>Total Governance Expenses</b>           | <b>\$ 40,355.66</b> | <b>\$ 151,760.13</b> | <b>\$ 173,571.00</b> | <b>\$ 21,810.87</b>   | <b>87%</b>  |
| <b>Legislative</b>                         |                     |                      |                      |                       |             |
| <i>Automobile/Mileage</i>                  | \$ -                | \$ -                 | \$ 500.00            |                       |             |
| <i>Consultant</i>                          | \$ 6,048.83         | \$ 65,255.47         | \$ 99,530.00         |                       |             |
| <i>Copies &amp; Print</i>                  | \$ -                | \$ -                 | \$ -                 |                       |             |
| <i>Dues &amp; Subscriptions</i>            | \$ -                | \$ -                 | \$ 137.00            |                       |             |
| <i>Gifts &amp; Contributions</i>           | \$ -                | \$ 30.00             | \$ -                 |                       |             |
| <i>Legal</i>                               | \$ -                | \$ 12,436.00         | \$ 2,000.00          |                       |             |
| <i>Meals &amp; Entertainment</i>           | \$ -                | \$ 1,619.68          | \$ 5,000.00          |                       |             |
| <i>Postage</i>                             | \$ -                | \$ -                 | \$ -                 |                       |             |
| <i>Prizes and Giveaways</i>                | \$ -                | \$ 120.00            | \$ 300.00            |                       |             |
| <i>Registration Fee</i>                    | \$ -                | \$ 10.45             | \$ -                 |                       |             |
| <i>Salaries</i>                            | \$ 5,652.98         | \$ 68,259.29         | \$ 56,804.00         |                       |             |
| <i>Sponsorship</i>                         | \$ -                | \$ 450.00            | \$ 1,500.00          |                       |             |
| <i>Staff Travel</i>                        | \$ -                | \$ 4,103.68          | \$ 8,575.00          |                       |             |
| <i>Stipends/Per Diems</i>                  | \$ 2,140.00         | \$ 4,280.00          | \$ 4,280.00          |                       |             |
| <i>Supplies</i>                            | \$ -                | \$ 317.82            | \$ 200.00            |                       |             |
| <i>Telephone</i>                           | \$ -                | \$ -                 | \$ -                 |                       |             |
| <i>Volunteer Travel</i>                    | \$ -                | \$ 105.00            | \$ 20,800.00         |                       |             |
| <b>Total Legislative Expense</b>           | <b>\$ 13,841.81</b> | <b>\$ 156,987.39</b> | <b>\$ 199,626.00</b> | <b>\$ 42,638.61</b>   | <b>79%</b>  |
| <b>Public Education</b>                    |                     |                      |                      |                       |             |
| <i>Dues &amp; Subscriptions</i>            | \$ -                | \$ -                 | \$ -                 |                       |             |
| <i>Grant Expenses - DHSS Joint Venture</i> | \$ -                | \$ -                 | \$ -                 |                       |             |
| <i>Postage</i>                             | \$ (199.27)         | \$ (0.00)            |                      |                       |             |
| <i>Salaries</i>                            | \$ 73.53            | \$ 3,946.61          | \$ 7,835.00          |                       |             |
| <b>Total Public Education Expenses</b>     | <b>\$ (125.74)</b>  | <b>\$ 3,946.61</b>   | <b>\$ 7,835.00</b>   | <b>\$ 3,888.39</b>    | <b>50%</b>  |
| <b>Recruitment &amp; Retention</b>         |                     |                      |                      |                       |             |
| <i>Consultant</i>                          | \$ -                | \$ -                 | \$ -                 |                       |             |
| <i>Copies &amp; Print</i>                  | \$ -                | \$ -                 | \$ -                 |                       |             |
| <i>Dues &amp; Subscriptions</i>            | \$ -                | \$ -                 | \$ -                 |                       |             |
| <i>Grant Expense</i>                       | \$ -                | \$ -                 | \$ -                 |                       |             |
| <i>Grants</i>                              | \$ 3,000.00         | \$ 7,662.53          | \$ 13,000.00         |                       |             |
| <i>Meals &amp; Entertainment</i>           | \$ -                | \$ 4,709.62          | \$ 17,500.00         |                       |             |
| <i>Postage</i>                             | \$ -                | \$ -                 | \$ -                 |                       |             |
| <i>Prizes &amp; Giveaways</i>              | \$ 920.00           | \$ 9,290.00          | \$ 11,510.00         |                       |             |
| <i>Salaries</i>                            | \$ 8,025.09         | \$ 44,900.85         | \$ 63,856.00         |                       |             |
| <i>Scholarships</i>                        | \$ -                | \$ 1,000.00          | \$ -                 |                       |             |
| <i>Sponsorships</i>                        | \$ 500.00           | \$ 5,000.00          | \$ 9,000.00          |                       |             |
| <i>Staff Travel</i>                        | \$ 365.54           | \$ 6,184.19          | \$ 7,100.00          |                       |             |
| <i>Supplies</i>                            | \$ 129.13           | \$ 152.30            | \$ 100.00            |                       |             |

| Missouri Dental Association                       |                       |                        |                        |                      |                        |
|---------------------------------------------------|-----------------------|------------------------|------------------------|----------------------|------------------------|
| Income Statement                                  |                       |                        |                        |                      |                        |
| September 30, 2025                                |                       |                        |                        |                      |                        |
|                                                   | Current Month         | Year to Date           | 2025 Annual Budget     | Budget Variance      | Budget %               |
| <i>Telephone</i>                                  | \$ -                  | \$ -                   | \$ -                   |                      |                        |
| <i>Volunteer Travel</i>                           | \$ -                  | \$ 642.00              | \$ -                   |                      |                        |
| <b>Total Recruitment &amp; Retention Expenses</b> | <b>\$ 12,939.76</b>   | <b>\$ 79,541.49</b>    | <b>\$ 122,066.00</b>   | <b>\$ 42,524.51</b>  | <b>65%</b>             |
| <b>Total Expenses</b>                             | <b>\$ 155,764.53</b>  | <b>\$ 1,332,592.62</b> | <b>\$ 1,768,559.75</b> | <b>\$ 435,967.13</b> | <b>75%</b>             |
| <b>Net Profit (Loss)</b>                          | <b>\$ (65,671.99)</b> | <b>\$ 239,329.10</b>   | <b>\$ 12,427.25</b>    |                      |                        |
| <b>Restricted Reserve Investment Activity</b>     |                       |                        |                        |                      |                        |
| <i>Dividends on Investment</i>                    | \$ 7,968.05           | \$ 46,466.24           |                        |                      |                        |
| <i>Unrealized Gain (Loss) on Investments</i>      | \$ 83,414.43          | \$ 188,222.15          |                        |                      |                        |
| <b>Total Investment Activity</b>                  | <b>\$ 91,382.48</b>   | <b>\$ 234,688.39</b>   | <b>\$ -</b>            |                      |                        |
| <b>Restricted Merit Income/Loss:</b>              | <b>\$ 3.86</b>        | <b>\$ (61.94)</b>      | <b>\$ (964.00)</b>     |                      |                        |
|                                                   | <b>\$ 25,706.63</b>   | <b>\$ 474,079.43</b>   | <b>\$ 11,463.25</b>    |                      | <b>\$ 1,636,487.00</b> |

**Missouri Dental Association  
Reserve Account Analysis  
9/30/2025**

| <b>Investment Fund Name</b>                      | <b>Value<br/>1/1/2010</b> | <b>Additions/<br/>Withdrawals</b> | <b>Total<br/>Investment</b> | <b>Value<br/>9/30/2025</b> | <b>Gain/<br/>Loss</b> | <b>Annualized<br/>Return Since<br/>Investment</b> |
|--------------------------------------------------|---------------------------|-----------------------------------|-----------------------------|----------------------------|-----------------------|---------------------------------------------------|
| Euro Pacific Growth Fund-A                       | -                         | (23,038.89)                       | (23,038.89)                 | -                          | 23,038.89             |                                                   |
| New Perspective Fund-A                           | 69,282.51                 | (124,377.54)                      | (55,095.03)                 | 52,857.63                  | 107,952.66            | -17.82%                                           |
| Capital World Growth and Income Fund-A           | -                         | 30,087.06                         | 30,087.06                   | 157,957.91                 | 127,870.85            | 11.22%                                            |
| American Balanced Fund-A                         | 133,784.40                | (70,000.00)                       | 63,784.40                   | 421,090.81                 | 357,306.41            | 11.92%                                            |
| SmallCap World Fund A                            | -                         | 30,000.00                         | 30,000.00                   | 55,883.36                  | 25,883.36             | 8.85%                                             |
| Washington Mutual                                | -                         | 175,000.00                        | 175,000.00                  | 448,771.70                 | 273,771.70            | 12.71%                                            |
| The Bond Fund of America                         | -                         | 60,000.00                         | 60,000.00                   | 64,419.82                  | 4,419.82              | 2.08%                                             |
| Intermediate Bond Fund                           | -                         | 62,046.51                         | 62,046.51                   | 68,371.41                  | 6,324.90              | 2.85%                                             |
| Short Duration Income A                          | -                         | 91,942.38                         | 91,942.38                   | 123,697.33                 | 31,754.95             | 2.61%                                             |
| LPL Financial 5348-3568                          | -                         | 406,000.00                        | 406,000.00                  | 504,846.34                 | 98,846.34             |                                                   |
| LPL Financial - US Treasury Bill 4828-4584       | -                         | 600,014.15                        | 600,014.15                  | 536,875.33                 | (63,138.82)           |                                                   |
| LPL Financial - US Treasury Bill-ERC\$ 5696-7995 | -                         | 195,026.98                        | 195,026.98                  | 217,884.82                 | 22,857.84             |                                                   |
|                                                  | 203,066.91                | 1,432,700.65                      | 1,635,767.56                | 2,652,656.46               | 1,016,888.90          |                                                   |
| <b>Reserve Accounts</b>                          | <b>Value<br/>1/1/2010</b> | <b>Additions/<br/>Withdrawals</b> | <b>Total<br/>Investment</b> | <b>Value<br/>9/30/2025</b> | <b>Gain/<br/>Loss</b> | <b>Current<br/>Interest Rate</b>                  |
| First Mid Bank and Trust Money Market            | -                         | -                                 | -                           | -                          | -                     |                                                   |
| Hawthorne Bank Money Market                      | -                         | -                                 | -                           | -                          | -                     |                                                   |
| Mid-America Bank Money Market                    | 246,000.00                | (75,000.00)                       | 171,000.00                  | 175,271.19                 | 4,271.19              | 0.65%                                             |
| River Region Credit Union Money Market           | 240,000.00                | (25,000.00)                       | 215,000.00                  | 227,636.28                 | 12,636.28             | 2.10%                                             |
|                                                  | 486,000.00                | (100,000.00)                      | 386,000.00                  | 402,907.47                 | 16,907.47             |                                                   |
|                                                  | 689,066.91                | 1,332,700.65                      | 2,021,767.56                | 3,055,563.93               | 1,033,796.37          |                                                   |

# MONITORING REPORT

## Communication and Support

### October 2025

**1.5 Communication and Support to the Board.** The ED shall not permit the board to be uninformed or unsupported in its work. *My interpretation: The ED shall make the board aware of any programs, endorsements, staff ad hoc formations etc., initiated by staff, keep board abreast of progress in carrying out assignments by the House or board and provide information that could impact the association and need the consideration of the board in a timely manner – through fax and/or email. To support the board ad hocs with a staff liaison to assist with research and clerical needs. This also keeps staff in the loop with committee activities.*

Evidence: To this point, MDA team projects, standing committees, ad hoc committees and taskforces work is regularly conveyed through ED and other reports to the Board, monitoring reports to Board, House reports, calls and emails with leadership (including both board and component leaders), and special meetings and/or conference calls of Board. Membership is informed through various MDA communications: the magazine, website, eNews, social media, MoDental on Demand, the blog and more. Thus, from this evidence, there is no shortage of communications by which the MDA team and the board communicates between each other (staff/board) and with the membership. The question we increasingly are asking ourselves is, “is anyone really reading; does any of this need to change; is there too much noise to focus on what we want members to know and do?” In January 2024, we added a communications team member (Devin Jungmeyer) who has increased our capacity in digital communications, especially social media. We continue to discuss all mediums available to communicate with members, especially cost vs. ROI. This analysis will continue as we embark on a new strategic plan and membership model. Aligning the right content, on the right platform, with the right timing – delivered to a diverse, busy and mostly unengaged audience – is a big ask. It can be easy to become discouraged, but we have been more intentional with more volume and more excellence than any time in recent memory. Failure only happens when we stop trying to improve; the MDA staff are continually trying and evaluating to improve communication efforts. Comment on textla app.

- (1) Neglect to submit monitoring data required by the board in a timely, accurate and understandable fashion, directly addressing provisions of board policies. *My interpretation: The ED shall provide the monitoring reports in a timely and concise manner. Some reports are required quarterly (membership and financials) while others are required at different times throughout the year. The ED shall provide to Board members in Board materials prior to each Board meeting (i.e., March reports prior to April meeting, June reports prior to August meeting, etc.). The reports will address each of the sections and subsections in the limitations. These will include evidence information when necessary. The Board adopted a new policy which allows for the ED to submit a basic statement of compliance without evidence for certain monitoring reports.*

Evidence: If there has been a change to the interpretation since the last report it will be noted with highlighted area. Reports have been sent in a timely manner.

- (2) Fail to report in a timely manner an actual or anticipated noncompliance with any policy of the board. *My interpretation: The ED shall report to the board immediately anytime there has been a breach of any policy of the board or if there is doubt about*

*the interpretation of a policy as it may apply to any given situation as it arises. It then becomes a decision that the president or an individual board member through the president, will have to call to question and decide whether the board needs to make a defining policy or if they are comfortable with the ED's interpretation. In an unanticipated noncompliance incident, the same provisions would come into play. If the incident occurs that the ED interprets that he/she can find no policy to base the decision, it would be incumbent upon him or her to confide at least with the president.*

Evidence: **Noncompliance has been addressed when circumstances arise.**

- (3) (shall not) Let the board be unaware of relevant trends; anticipated adverse media coverage; threatened or pending lawsuits; potential, relevant state legislation or regulatory changes; MDA's programs and services; contractual and endorsement relationships (other than maintenance contracts) to which MDA is a party; or any board policy that was developed based on at the time current, accurate or assumed accurate information and/or research, where circumstances have changed or new information has shown the previous findings not totally accurate. *My interpretation: "relevant trends" means any correspondence or verbal contacts that would lead one to believe the information that we are operating under may be changing for better or worse, i.e. amalgam waste/environment. "anticipated adverse media coverage" would follow the previous interpretation but also include any calls from the media for interviews that may indicate adverse potential. "Threatened or pending lawsuits" the ED should immediately make the board aware of the circumstances along with a "best guess" recommendation following consultation with the association's legal counsel. Potential, relevant state legislation or regulatory changes means the ED shall diligently follow all pending legislation while the general assembly is in session and shall immediately review each publication of the Missouri Register to check for filed proposed regulations that could possibly affect dentistry and submit comments where appropriate within the allotted time frame; MDA's programs and services would indicate that the ED keep the board abreast of how well current programs and services are received, progress on development of any new programs and services available or proposed as well as the recommendation or decision to discontinue any programs or services. Contractual and endorsement relationships: any that the ED has entered, as they happen, and updates on the existing endorsement programs to which the MDA is a party; any board policy that was based on ... information that has changed: it is the ED's responsibility to make the board aware immediately.*

Evidence: The Board is kept apprised of matters which affect MDA programs and services, endorsements, contractual relationships, personnel matters, policies, dental practice act statute and rule changes or considerations, etc., through proper means of communications. **The Board is apprised of ADA and component matters affecting the dental profession and the membership of the MDA.**

- (4) Fail to advise the board if, in the ED's opinion, the board is not in compliance with its own policies on Governance Process and Board-Management Linkage, particularly in the case of board behavior that is detrimental to the work relationship between the board and the ED. *Interpretation: It becomes the ED's responsibility to be completely versed in the Governance Process and Board-Management Linkage policies. Should there be a breach of those policies by an individual board member or by the board, it will become incumbent for the ED to make the president or the board as a whole (whichever is appropriate) aware and to have the matter corrected.*

Evidence: Considerations for change in policies are discussed by staff and Executive Committee and approved by the MDA Board. Board's must be careful to always remember the policies of the MDA Board including speaking with one voice, proper protocol for delivering MDA policy, fiduciary responsibility and duty of care, loyalty and obedience to the MDA. Additionally, the Board members should read and understand the email confidentiality statements and protocols. Board members should read through MDA Governance Policy 2.15 Board Member Code of Conduct. At its August 2018 meeting the MDA Board adopted a Board policy on sexual harassment and anti-discrimination. This policy is reviewed annually. With MDA's 2028 Strategic Plan, the Board and staff took on the obligation to "get better" by regular trainings. The first training was conducted by Scott Fowkes, ADA head legal counsel who addressed Anti-trust matters, the second was a Board Refresh led by Bob Harris, CAE whereby the Board addressed their policies and responsibilities and spent time outlining some key takeaways for future action. Both training courses were in 2025.

- (5) Fail to marshal for the board as many staff and external points of view, issues and options as the board determines it needs for fully informed board choices.

*Interpretation: The ED shall not rely on personal information, but to include staff, members at large, attorneys, accountants, lobbyists, anyone with expertise in the matter to gather research to allow the board to make an accurate assessment when developing policy. The information shall not be biased to the benefit of the ED or any policy maker. Should additional information become available at a later date, the board shall be advised immediately as described in #3.*

Evidence: We are prepared to call in the experts to provide the necessary background or consultation for the MDA Board. Utilization of MDA attorneys, accountants and consultants has increased to fully inform and/or facilitate Board discussion. Matters in terms of personnel, leasing space, contracts, endorsements, employment law, COVID-19 matters, etc., often require legal counsel for advice and/or drafting of contracts. The Executive Director regularly consults with the MDA officers on matters which require direction or immediate attention. We strategically invest in partners who have the expertise and skills to help us identify, refine and successfully deliver our marketing and membership messages. In the past, analysis with the assistance of a marketing firm, High 5 has been pivotable in helping us identify pain points, key metrics and new messages to drive a communications/marketing strategy to assist the association with achieving its goals. These campaigns have been geared toward advocacy awareness, non-renews, new dentists, EFDA and OPA. Consulting with professionals on these campaigns has made a huge difference for the MDA overall marketing and membership campaigns. While we are not employing any current campaigns, we know these firms are ready to assist and build on the foundational messaging we have created with them – such as what may be needed in the future for successful advocacy work regarding OPA EFDA. In addition, in 2025 with assistance from SPA funds, we engaged with an existing DLR campaign initiative used by several other associations. MDA communication and lobbying teams are working on a MORE FOR YOUR SMILE campaign to enhance the public's understanding of what dental insurance actually is, but more importantly assist dentists in speaking about this with patients, all while the MDA works to legislate a dental loss ratio, more will be shared on the campaign tactics and specifics as it is rolled out.

- (6) (shall not) Present information in unnecessarily complex or lengthy form or in a form that fails to differentiate among information of three types: monitoring, decision preparation, and other. *Interpretation: (No change since last report) Unnecessarily complex: the information presented shall be broken down into increments to assure*

that all sides of the issue are researched; lengthy form: be concise, accurate but not wordy just for the sake of trying to impress; or differentiate among information among three types: monitoring: on the current status of the appropriate issues to show the board how the ED interpreted the issue in comparison to established policy allowing the board to evaluate performance. Decision preparation would involve the necessary research to provide pertinent information to allow the board to make a rational and informed decision when developing policy; Other: unknown factor.

Evidence: The Board changed the format for various monitoring reports, including this one, to allow for a basic statement of compliance of the policy without specific evidence. When evidence is changed it is highlighted. Some reports by nature require more detail for Board members to be fully informed. MDA team sent a communications survey to the Board asking for the best form for delivering content to the Board. The survey outlined that the Board still feels email is the best option, likes to have text reminders and rarely visits the Board page on the website. The MDA team will take this into consideration. Following the Board Refresh training, the Board agreed that monitoring reports likely need significant adjustments sharing information in a simpler (i.e., dashboard) format. The MDA Strategic Plan addresses the need to explore these areas, and work will be done to achieve more concise shared information. The MDA does have a text service it is using for texting reminders to all members for specific events, Board meetings, etc, called Textla.

- (7) Fail to provide a mechanism for official membership, board, officer, committee or House of Delegates communications or meetings. *Interpretation: Mechanism: a venue for information such as the Focus magazine, broadcast email, conference call, fax, print material; communications: using one of the afore mentioned venues to inform the membership, board, officer, committee, HOD of a meeting, decision or other action they need to stay informed; meeting: using one of the venues above to inform the necessary individual or group about a meeting and also providing an appropriate and convenient setting for such.*

Evidence: During session, we send emails and action alerts to inform members of legislative activity. We will continue to inform the membership with legislative updates either weekly, bi-weekly, monthly or as needed or through use of a new system, Spark Influence. Spark will be used to engage the membership to easily contact with legislators when we issue alerts. Spark Influence is similar to VoterVoice but allows integration between grassroots advocacy and PAC efforts. These efforts will be led by Halie Payne (Professional Affairs Director) and Grace Riley (MDA Legislative Liaison). We've implemented email updates and continue to use the Focus magazine for communication purposes. We use all means available (business meetings, virtual events, hybrid events) to share messages on important topics. We will continue to have visits at a variety of student and new dentist events by Paul Roberts (Outreach Director), Riley Bernskoetter (Program Manager) and Jerri Wildhaber (MDIS Operations Manager). Our communications are vast with a website, social media, magazine, blog, and regular eNews Updates to membership.

- (8) Fail to deal with the board as a whole except when responding to officers or committees duly charged by the board. *Interpretation: Board as a whole: treat each member of the board equally with respect to providing the whole board with the same information at the same time; except when responding to: when communicating with the president, executive or finance committee, legislative and regulatory chair or the treasurer or the speaker of the house on individualized concerns, it is not absolutely*

*necessary to inform the whole board. The same would be appropriate when dealing with a committee or ad hoc of the board – only those members would have to be fully included and informed.*

Evidence: It is my conclusion the board, officers, committees, membership and the House of Delegates members have been informed about all current activities of the association and the staff has and continues to use fax, phone, *Focus* magazine, eNews updates, individual or group email, printed material, conference calls, face-to-face, virtual meetings, or whatever means appropriate to keep the board and membership informed. Regular updates are made to modental.org related to House resolutions.

- (9) Fail to comply with any mandate from the MDA House of Delegates. *Interpretation: Board and staff members will conduct proper actions with regards to resolutions adopted by the House of Delegates. Compliance could mean a host of things in terms of what is requested of the House. It could include, research, development, formulating action plans, researching legal ramifications, etc. This does not necessarily indicate that the request has been or can be fully completed. In any case, the Board reports to the House of Delegates each year on resolutions adopted by the House and their status.*

Evidence: The Board and staff work on House of Delegates resolutions and updates are included in the Board Report to the MDA House of Delegates and at regular intervals through the MDA website.

- (10) Fail to provide a written report to the Board from every ED committee with a current assignment by the deadline for inclusion with the agenda for every Board meeting except the Board meeting that immediately follows the House meeting. *Interpretation: Reports for current assignments related to MDA staff Ad hocs or Committees are prepared for the Board meetings. Sometimes the reports are giving verbally. Current assignments for the Board standing or ad hoc committees are requested and sent with Board materials, if received. Often, Board members wish to give verbal reports.*

Evidence: Reports have been submitted for Ad hocs with current assignments.

- (11) Fail to conduct an annual review and provide a report to the Board on the ad hoc committees which have ceased to exist due to task completion. *Interpretation: Ad hocs or taskforces are often created for a specific purpose or for a specific timeframe. Once the ad hoc or taskforce work is complete it should be sunsetted (therefore these committees will be retired).*

Evidence: The only remaining ad hoc committee of the board currently is the Governance Review Ad Hoc Committee. With the establishment of the House of Delegates Governance Task Force, it is my suggestion that this committee be sunset.

All new information is highlighted. It is my contention that I am in compliance with the policies of Communications and Support.

**Vicki Wilbers, Executive Director, October 2025**

## MONITORING REPORTS

October 15, 2025

### 1.9 membership recruitment and retention

**1.9 Membership Recruitment and Retention.** The ED shall not fail to **conduct membership recruitment and retention activities engaging with dentists and dental students in Missouri.** *Interpretation: The ED shall use the numbers of licensees reported by the Missouri Dental Board (and include the American Dental Association market share measurements beginning with March 2015 report) to have an active license and practicing or retired and living within the state to establish a percentage of membership. All categories of membership, including those on waivers, are to be included in the calculation. Excluded from the count will be affiliate, associate, student and graduate members.*

#### **Evidence:**

**Status on MedPro Rebate:** Graduating students going into practice in Missouri and purchasing a MedPro malpractice insurance coverage through MDIS, may qualify for MDA to pay for their first year's policy (\$50) if eligible requirements are met. The following provides a breakout for each year to show how many students qualified and used the rebate.

#### **2025 Q3- 29**

2024 (EOY) - 28

2023 (EOY) - 29

2022 (EOY) - 28

2021 (EOY) - 32

2020 (EOY) - 22

2019 (EOY) - 28

#### **2024/2025 Recruitment & Retention Schedule:**

November 1 – ADA sent an email notice to all members; time to renew message. MDA sent a paper statement that was mailed to all members except those that are on an auto renew payment plan.

November 15 – All retired life members received a letter thanking them for being a member, membership is free but gave them an opportunity to purchase the Focus and donate to the voluntary items, such as the PAC's and Foundation's.

December 1 – ADA sent email to those that have not renewed.

December 30 – ADA sent email to those that have not renewed.

January 1 – Non-renews are now considered as being delinquent (pending).

January 31 – The ADA is coordinating the next few batches of electronic invoices for non-renews. Those reminders will go out **Jan 31st, Feb 14 & 28, and March 14 and 31.**

January 31 – End of month summary of membership report was sent to component leaders and new dentist committee and will continue each month throughout the year.

February 5 – Mailed 2<sup>nd</sup> dues statement to those that have not renewed.

February 12 – Non-member solicitation letter and “Step Up and Step In” stuffer were mailed. They only have the option of using the new system and pay online. Fonteva does not allow us to mail a paper statement to non-members. The solicitation was mailed to 806 practicing active licensed dentists that have been out of dental school no more than 30 years. A reminder email was sent to the entire list as well prompting people to look for the mailer or to use the link to renew online. MDA was again able to offer 289 non-members a 50% off incentive to new dentists (10 years out of dental school).

March 3 – ADA non-renew calling campaign started. ADA staff calling non-renews with script along with announcements of upcoming MDA events.

| <b>Missouri Dental Association: Non-Renew Calls as of 4/7/2025</b>                                                                                                                                                                                                                                                                                                                                                                                                                                  |       |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------|
| Total Calls Eligible for Renewal (see* below)                                                                                                                                                                                                                                                                                                                                                                                                                                                       | 237   |
| Total Renewals (see** below)                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | 73    |
| Renewal Conversion Rate                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | 30.8% |
| Records with Bad Data in Salesforce (no contact in multiple channels)                                                                                                                                                                                                                                                                                                                                                                                                                               | 0     |
| Pledged they would renew, but have yet to                                                                                                                                                                                                                                                                                                                                                                                                                                                           | 2     |
| Indicated they are retired                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | 7     |
| <p>*Total Calls Eligible for Renewal includes the number of doctors successfully contacted, minus those that had already renewed when contact was attempted, and those that were subsequently marked as having bad data.</p> <p>**Total Renewals includes the number of renewals made directly over the phone, and those that renewed on their own at some point after the initial contact was made. This count does <i>not</i> include those that had already renewed prior to calls starting.</p> |       |

April 1 – Non-renews are now considered as non-members. The ADA will continue sending reinstatement campaign emails to this group in April and May.

April/May – National Signing Day activities were conducted at MOSDOH and UMKC. MDA staff helped convert more than 85% of graduates from each school.

June 18 – ADA provided their EOY Report for 2024.

July 1- The 2025 Half Year Dues (HYD) promotion launched. A fully integrated marketing plan launched July 1, including email, boosted social media, paid media, paid search and a custom landing page.

July 11 -The ADA ran their new grad conversion report. Our New Dentist market share has grown 5.3% since EOM July 2025.

September 19 - The ADA 15-for-12 promotion (Sept. 19–Dec. 15, 2025) and the Quarter Year Dues campaign are now live. Both allow eligible individuals to join for \$0 ADA dues through the end of 2025, with auto-renew required for 15-for-12.

**Furthermore,**

- (1) The ED shall not fail to inform the MDA board on a quarterly basis of market share numbers.
- (2) The ED shall not fail to attempt to maintain a market share of two percentage points higher than the ADA market share from the previous end of year report of active licensed dentist in Missouri.
- (3) The ED shall not fail to attempt to maintain a minimum of three percentage points higher than the American Dental Association market share from the previous end of year report of active licensed "New Dentists" who are eligible for association membership.

*Interpretation: New Dentists are those dentists having graduated within the past 10 years from dental school and are practicing in this state and members of the Association. Dentists on active waivers will count as members. These figures come from ADA figures presented as the End of Year annual report.*

**Evidence:**

The total number of active licensees per the ADA market share measurement on **October 7, 2025** is **3109**.

Using the total MDA active membership total - the percentage of active licensed membership as of **October 7, 2025** is **56.3%**. As of **October 7, 2025** we have **184 new members** and **210 non renews**.

On **October 7, 2025**, the Missouri active licensed dentists market share was **56.3%**. MDA market share compliance is based on adding **2%** to the ADA's latest market share numbers from **December 31, 2024**. The ADA's active licensed dentists market share on **12/31/2024** was **53.5%**. The Executive Director and the MDA is in compliance.

On **October 7, 2025**, the Missouri active licensed new dentists market share was **57.9%**. MDA market share compliance is based on adding **3%** to the ADA's latest market share numbers from **December 31, 2024**. The ADA's New Dentist market share on **12/31/2024** was **54.8%**. The Executive Director and the MDA is in compliance.

**Vicki Wilbers, Executive Director October 15, 2025**

October 14, 2025

Via Email: [vicki@modentalmail.org](mailto:vicki@modentalmail.org)

Ms. Vicki Wilbers  
Executive Director  
Missouri Dental Association  
3340 American Ave.  
Jefferson City, MO 65109

Dear Ms. Wilbers:

At its September 25-26, 2025 meeting, the Commission for Continuing Education Provider Recognition (CCEPR) reviewed Missouri Dental Association's letter dated September 11, 2024, stating the organization's intention to voluntarily discontinue participation in ADA CERP.

The Commission acknowledges Missouri Dental Association's request. This letter confirms that effective December 31, 2025, Missouri Dental Association will be withdrawn from the list of ADA CERP recognized providers.

In taking this action, all License Agreements between Missouri Dental Association and the American Dental Association will be terminated on December 31, 2025. After that date Missouri Dental Association will no longer be authorized to reference ADA CERP recognition in publicity, verification of participation forms or any other materials it distributes.

We appreciate your past participation in the program. If your organization is interested in pursuing ADA CERP recognition in the future, you may initiate the new application process. Information about the ADA CERP application process may be obtained at [CCEPR.ADA.org](http://CCEPR.ADA.org) or by contacting CCEPR staff at [CERP@ada.org](mailto:CERP@ada.org).

Sincerely,



Marc G. Nuger, DDS  
Chair, Commission for Continuing Education Provider Recognition

cc: Kelli Cousins, interim director, Commission for Continuing Education Provider Recognition  
Mandy Lewis, Education and Events Director, Missouri Dental Association

**Major Actions of the Missouri Dental Association Foundation  
Board of Trustees Meeting  
September 19, 2025**

- Meeting called to order by Dr. Jeremy Bowen at 9:02 a.m.
- Officers present: Dr. Jeremy Bowen, Chair; Dr. Kirk Opdahl, Vice Chair; and Dr. Lynne Barbour, Secretary/Treasurer. Board members present: Dr. David Dumbach, Dr. Emily Hahn, Dr. Darren Mahaffey, Dr. Josh Montgomery, Dr. Danielle Riordan, Dr. Caitlin Rosemann, Dr. Chloe Stuck, Dr. Tim Taylor and Ex-Officio Member Vicki Wilbers, MDA Executive Director.
- Board member absent: Dr. Claire Williams.
- MDA staff members present: Paul Roberts, Foundation and Outreach Director; Margie Kunze, Governance Manager, and Stacey Hemmel, Operations Director.
- Dr. Bowen requested that board members review the agenda and disclose possible conflicts of interest with any agenda items, and none were reported.
- Dr. Riordan moved and the board approved adoption of the agenda.
- Dr. Barbour provided a Finance Committee report including the following:
  - A MOMOM annuity is coming due at the end of September with approximately \$52,000 previously earmarked for access to care. The Finance Committee approved to move the entire balance to the Foundation general checking to cover access to care expenses already paid out of general checking.
  - The Finance Committee approved to move the money market balance of \$4,482.67 to general checking.
  - The administrative agreement between the MDA and MDAF has been approved with no changes for 2026.
  - Dr. Barbour discussed various areas of the proposed 2026 budget and fielded questions.
  - The Finance Committee suggests that the MDAF voluntary contribution amount listed on MDA dues remain \$150 for 2026.
- Dr. Riordan moved and the board approved the 2026 MDAF Budget as presented.
- Dr. Stuck moved and the board approved motion that the voluntary contribution amount listed for the MDA Foundation on the 2026 dues statement remain \$150.
- Dr. Mahaffey referred to the nominating committee report. Board terms expiring are Drs. Emily Hahn, Kirk Opdahl, Chloe Stuck, Danielle Riordan, and Caitlin Rosemann. Each board member was asked if they wish to continue for another term and they all agreed to serve another term. Dr. Opdahl moved and the board approved motion to submit Drs. Emily Hahn, Kirk Opdahl, Chloe Stuck, Danielle Riordan, and Caitlin Rosemann to the MDA Board of

Trustees for official election to another 3-year term on the MDAF Board. *Note: All new terms will begin following official approval by the MDA Board at its November 7, 2025 meeting.*

- Dr. Riordan moved and the board approved motion to elect the 2026 officers as follows: Dr. Jeremy Bowen, Chair, Dr. Chloe Stuck, Vice Chair, and Dr. Lynne Barbour, Secretary-Treasurer.
- Dr. Bowen stated the Finance Committee currently consists of the three officers, the MDA Executive Director and the Foundation Director, but the Chair has the option to appoint up to two additional board members. Dr. Bowen, as Chair, appointed Drs. Darren Mahaffey and Kirk Opdahl as members of the finance committee in addition to officers, Drs. Bowen, Stuck and Barbour.
- The board discussed the potential for a KCU College of Dental Medicine (CDM), Southwest Dental Society and MDA Foundation partnership pilot outreach program to provide limited high need care to the underserved community with the hope of establishing continuation of care. Mr. Roberts reviewed the plan and timeline of the project and asked for the board's input. The board advised Mr. Roberts to continue working with KCU CDM and the Southwest Dental Society to see how the MDAF might partner in this effort. Additionally, Mr. Roberts will share the template of the plan with board members for their efforts in working with the other dental schools in the state for similar projects.
- Dr. Rosemann said Dr. Don Altman, ATSU Missouri School of Dentistry and Oral Health Interim Dean, is planning a big alumni event with clinical exposure that will be with Dr. Herb Silva and veterans in 2026 or 2027. They are also in the early planning stages of putting a special needs clinic together. They are trying to raise funds for that now. Besides Chicago and Memphis, there are not special needs resources for dental in this area so maybe the MDAF can partner with them on this venture as well.
- Mr. Roberts provided a Director's Report which included:
  - The Finance Committee approved donations for GKAS golf tournament and for dental lab fees for an employment readiness program for incarcerated women through the Missouri Women's Council, with dental services donated by Dr. Ron Wilkerson.
  - MOMOM computers that were purchased in 2016 will need to be wiped and destroyed as they will no longer support Window OS.
  - Scholarships checks were sent in July. The Scholarships Awards Dinner for UMKC is October 6 and Mr. Roberts is unable to attend. Dr. Barbour agreed to attend to represent the board. Mr. Roberts said MOACD awarded three more scholarships to students that the MDAF did not choose. Therefore, 9 out of the 21 applicants received some financial support this year. Promotion for 2026 will begin in December.
  - Connect4Cash: 149 tickets were sold, which was down 12 from the previous year, with 20 Vendor prizes. We raised \$1,100 from second chance sales, \$800 from component societies. Some winners donated money back or reinvested in second chance sales. We had \$12,627 in profit after prize payouts.

- Public Supply Requests: There were 27 requests so far in 2025 .We have enough in stock to fill 8 more orders before the end of the year.
- Dr. Riordan moved and the board approved the consent agenda which contained the following:
  - Approval of March 21, 2025 Board Meeting Minutes
  - 2025 Contributions
  - August 2025 Income Statement
  - August 2025 Balance Sheet
  - Bank Account Summary
  - Investments Summary
  - MOMOM Financials
  - MDA/MDAF Administrative Service Agreement
  - 2024 Auditor's Compilation
- Dr. Bowen asked if there was any unfinished business and there was none.
- Dr. Bowen asked if there was any new business and there was none.
- The next meeting dates of the MDA Foundation Board will be March 27, 2026 and will be in person at the MDA Executive Office. The fall meeting will be on September 18, 2026 and will be held virtually.
- With no further business, the meeting was adjourned at 10:00 a.m.



Mike Kehoe  
Governor  
State of Missouri

Sheila Solon, Division Director  
DIVISION OF PROFESSIONAL REGISTRATION

Missouri Department of  
Commerce & Insurance  
Angela L. Nelson, Director

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**MISSOURI DENTAL BOARD**

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Jefferson City, MO 65102-1367  
573-751-0040  
573-751-8216 FAX  
800-735-2966 TTY Relay Missouri  
800-735-2466 Voice Relay Missouri

Brian Barnett  
Executive Director  
dental@pr.mo.gov  
pr.mo.gov/dental

**Missouri Dental Board Report**

**Date:** October 20, 2025

At the Missouri Dental Board's October meeting, the Board added an item to its task list to determine standards for Board approved nitrous oxide training courses for dental assistants. Currently, the rules do not provide any guidance for what criteria must be met for a course to be approved as qualifying for a nitrous permit. The Board is planning to discuss the determination of those standards further at its January meeting.

The rule change requiring licensees to provide copies of their continuing education documents as part of the renewal process will become effective October 30, 2025. The integration between CE Broker and the Division of Professional Registration's new licensing system, MOPRO, is still being constructed. Once that link is completed, we will begin a campaign to notify licensees that the CE Broker system is available. Licensees can go to CE Broker and register their free account now, but until the integration is completed they will get a message stating that the link to the Missouri system is not available yet.

The Board is still encouraging licensees to log into the MOPRO system and register their account. Once a licensee registers his/her account they can manage their license including changing addresses and phone numbers and even printing copies of their license. To visit the MOPRO site, go to <https://mopro.mo.gov/license>

The Missouri Dental Board's next scheduled open meeting will be January 9, 2026. That meeting will be a virtual meeting and will begin at 9:00 am.

As always, should anyone have any questions or comments, please do not hesitate to contact the Board office at (573) 751-0040.

Respectfully Submitted,

Brian Barnett

# Dental Lifeline Network • Missouri

## Donated Dental Services (DDS) Program Highlights

### October 2025



For more information go to [dentallifeline.org](http://dentallifeline.org) or contact a DLN • MO Leadership Council member

Lisa Bosch, DMD (Chair)

Brandon K. Bennett, DDS, FAGD  
William Cohen, DDS  
Jon Copeland, DDS  
Timothy Curry, DDS  
Brett Durbin, DDS  
Janet Ruopp, DDS  
James Schmidt, DDS  
Kyle Shull, DDS  
David Suchman, DDS  
David Urbanek, DMD, MS

Michael Berry, DDS (Advisor)

Or contact MO DDS Coordinator:  
**Fransisca Villa**  
573.636.4440  
[fvilla@DentalLifeline.org](mailto:fvilla@DentalLifeline.org)

Dental Lifeline Network is grateful for the Missouri Dental Association's partnership in developing the Donated Dental Services (DDS) program in 1999, and for its long-time support of helping people with disabilities or who are elderly or medically fragile and have no other access to dental care.

A generous network of Missouri dentists and labs have donated over \$12.4 million worth of comprehensive treatment to 2,508 patients in need. Thank you! **More volunteers are needed statewide, if you would like to get involved, please visit [WhyDental.org](http://WhyDental.org) or scan the QR code below.**

| Donatd Dental Services (DDS) Program Totals    |                  |                  |
|------------------------------------------------|------------------|------------------|
|                                                | 7/1/25-9/30/2025 | 7/1/24-6/30/2025 |
| <b>Patient Treatment</b>                       |                  |                  |
| Patients Served <sup>1</sup>                   | 63               | 107              |
| Patients on Waitlist                           | 99               | 94               |
| Volunteer Dentists                             | 304              | 309              |
| Volunteer Labs in MO                           | 95               | 96               |
| Participating Labs outside MO                  | 7                | 7                |
| <b>Financial</b>                               |                  |                  |
| Value of Care to Patients Treated <sup>2</sup> | \$74,991         | \$356,559        |
| Average Value of Treatment/Case <sup>3</sup>   | \$5,876          | \$6,489          |
| Value of Donated Lab Services                  | \$8,659          | \$24,162         |
| <b>Since Program Inception (1999)</b>          |                  |                  |
| Total Patients Treated                         | 2,508            |                  |
| Total Value of Care to Patients Treated        | \$12,401,829     |                  |

<sup>1</sup>Donated treatment value includes donated lab value

<sup>2</sup>Average value is based on patients that have completed comprehensive treatment; it does not include active patients, or patients who continue to receive ongoing care from their DDS volunteer.

<sup>3</sup>Number of Patients Served includes patients who completed their treatment plan, patients who received services, but treatment plan is not yet complete, and patients who are linked with a volunteer but haven't yet received treatment.

**The Missouri DDS Program helps people like Harrison**, 65, who lives in Howell County. Harrison lives with a disability and suffers from heart disease and arthritis. Unfortunately, Harrison's dental health was another problem. He hadn't been to a dentist in more than 12 years and his dental health had begun to decline. His existing dentures had broken and no longer fit, making eating difficult and leaving him without any teeth.

Sadly, Harrison could not afford new dentures. He survives on food assistance and Social Security benefits, and his fixed income is entirely consumed by his basic monthly living expenses. Though he has Medicaid benefits, they did not cover the dental treatment he desperately needed. It seemed Harrison had nowhere to turn for help regaining his dental health.

Thankfully, two generous DDS volunteers came to Harrison's aid. A general dentist and dental laboratory partnered to donate full upper and lower dentures. Thanks to these caring volunteers, Harrison received thousands of dollars in donated, comprehensive treatment that restored his dental health! Harrison shared his appreciation for this life-changing gift:

*"I am disabled and my income is very limited. I do without lots of things to just get by. I would still be without teeth if I hadn't received help from Donated Dental Services and the wonderful dental staff and lab. I appreciate everyone so, so much."*

**-MO DDS Patient, Harrison**





## Resources

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# Missouri Dental Association

## **FORGING THE FUTURE 2025-2028**

**Mission Statement: Helping All Dental Professionals Succeed**

### **Goal 1: Professional Impact**

#### **Equipping Dental Professionals to flourish in Every Stage of Their Journey**

- 1.1 Focus on dental professionals' needs in an ever-changing environment while broadening engagement opportunities and benefit offerings with an eye toward increasing market share
- 1.2 Ensure a committed culture of diversity and inclusion
- 1.3 Foster a culture of well-being for dental professionals

### **Goal 2: Financial & Organizational Stability**

#### **Ensure Financial & Organizational Stability to Serve the Profession with Integrity**

- 2.1 Total revenue including dues and non-dues revenue, will increase 2-4% annually
  - Reserve funds are a minimum of 50% of annual operating expense
  - Non-dues revenue are a minimum of 50% of total revenue
- 2.2 Ensure a sustainable membership model and dues structure for continued growth
- 2.3 Focused on increased engagement opportunities with Members & Customers (non-members)
- 2.4 Ensure state and local component society alignment and support
- 2.5 Ensure alignment of the MDA and its subsidiary organizations for continued mutual success
- 2.6 Ensure the MDA organizational structure is adaptive for continued success

### **Goal 3: Community Impact**

#### **Advocate for Improving the Profession and the Oral Health of the Public**

- 3.1 Leverage partnerships and outreach opportunities to improve all aspects of the oral health of Missouri citizens
- 3.2 Sustain and increase involvement for legislative initiatives
- 3.3 Ensure continual improvement of the Missouri Dental Medicaid program

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## Acronyms

|                    |                                                   |
|--------------------|---------------------------------------------------|
| <b>AADB</b>        | American Association of Dental Boards             |
| <b>ADABEI</b>      | ADA Business Enterprises                          |
| <b>ADA CERP</b>    | Continuing Education Provider Recognition         |
| <b>ADPAC</b>       | American Dental Political Action Committee        |
| <b>AOB</b>         | Assignment of Benefits                            |
| <b>ASCDE</b>       | American Society of Constituent Dental Executives |
| <b>ASDA</b>        | American Student Dental Association               |
| <b>ATL</b>         | Action Team Leader (ADA Lobby Day)                |
| <b>ATSU MOSDOH</b> | ATSU Missouri School of Dentistry and Oral Health |
| <b>BOT</b>         | Board of Trustees                                 |
| <b>C4S</b>         | MDA Connect4 Success (CE meeting)                 |
| <b>CDA</b>         | Certified Dental Assistant                        |
| <b>CODA</b>        | Commission on Dental Accreditation                |
| <b>DAC</b>         | Dental Advisory Committee (to MO HealthNet)       |
| <b>DANB</b>        | Dental Assisting National Board                   |
| <b>DDMO</b>        | Delta Dental of Missouri                          |
| <b>DSOs</b>        | Dental Support Organizations                      |
| <b>DWBF</b>        | Missouri Dental Well Being Foundation             |
| <b>EFDA</b>        | Expanded Function Dental Assistant                |
| <b>FH</b>          | Fleischman Hillard (PR firm)                      |
| <b>GBO</b>         | Group Buying Organization                         |
| <b>H5</b>          | High Five (Marketing Firm)                        |
| <b>HOD</b>         | House of Delegates                                |
| <b>HPI</b>         | ADA Health Policy Institute                       |
| <b>JCAR</b>        | Joint Committee on Administrative Rules           |
| <b>KCU CDM</b>     | KCU College of Dental Medicine                    |
| <b>LRC</b>         | MDA Legislative & Regulatory Committee            |
| <b>MCOH</b>        | Missouri Coalition for Oral Health                |
| <b>MDAF</b>        | MDA Foundation                                    |
| <b>MDB</b>         | Missouri Dental Board                             |
| <b>MDIS</b>        | Missouri Dental Insurance Services                |
| <b>MODentPAC</b>   | Missouri Dental Political Action Committee        |
| <b>MERIT</b>       | Missouri Emergency Response Identification Team   |
| <b>MLR</b>         | Medical Loss Ratio                                |
| <b>MOMOM</b>       | Missouri Mission of Mercy                         |
| <b>MPCA</b>        | Missouri Primary Care Association                 |

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|                 |                                           |
|-----------------|-------------------------------------------|
| <b>NCOIL</b>    | National Council of Insurance Legislators |
| <b>NDC</b>      | New Dentist Committee                     |
| <b>ODH</b>      | Office of Dental Health                   |
| <b>OPA</b>      | Oral Preventive Assistant                 |
| <b>PDMP</b>     | Prescription Drug Monitoring Program      |
| <b>RFP</b>      | Request for Proposal                      |
| <b>UMKC SOD</b> | UMKC School of Dentistry                  |



## Unfinished Business

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**Missouri Dental**  
A S S O C I A T I O N

## New Business

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## Executive Session

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## Next Meeting & Announcements

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- **Board of Trustees Meeting: January 30, 2026 at 10:00am**
- **MDA Dental Day at the Capitol & Leadership Summit - March 4, 2026 \* MANDATORY**



**Missouri Dental**  
A S S O C I A T I O N

## Adjournment

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