

Resolution No. [Resolution Number] [Type]  
Report: [Report] Date Submitted: 6/29/2025  
Submitted By: Dr. Spencer Bloom, Delegate, Illinois  
Reference Committee: [Reference Committee for Worksheet]  
Total Net Financial Implication: [Total Net Financial Impl.] Net Dues Impact:  
Amount One-time: Amount On-going:  
ADA Strategic Forecast Outcome: Tripartite: Achieve a stable and successful Tripartite.

**MODERNIZATION OF ADA ELECTION AND CAMPAIGN RULES FOR FAIRNESS AND COMPLIANCE**

**Explanation to Delegates**

This resolution is comprehensive because it consolidates, modernizes, and reforms **the entire ADA Election Commission and Campaign Rules** to reflect current expectations of fairness, equity, and nonprofit compliance. We have provided full documentation for transparency and ease of review:

- **Appendix A:** Redlined version of the current (2024) rules, with additions underlined and deletions struck through.
- **Appendix B:** Clean version of the proposed new rules that would become policy if adopted.
- **Appendix C:** Justification outlining how the current rules violate IRS 501(c)(6) governance standards, especially equal access, procedural fairness, and avoidance of private benefit.
- **Appendix D:** A side-by-side table comparing the 2024 rules with the proposed version, explaining what changed and why.

Delegates are encouraged to review the appendices in sequence to understand both the structural problems being addressed and the solutions being proposed. This is a complete update, not a minor revision, and it is designed to strengthen ADA governance through transparency, consistency, and fairness. **This resolution replaces the current ADA Election and Campaign Rules with a unified, modernized framework designed to promote fairness, expand access, and ensure compliance with nonprofit governance principles. It empowers all candidates equally, regardless of announcement timing, wealth, or connections, and protects the ADA's integrity as a national professional association.**

**Background:** The American Dental Association (ADA), as a 501(c)(6) member-governed nonprofit, has a legal and ethical obligation to conduct its elections in a manner that is fair, neutral, and consistent with the core governance principles outlined by the Internal Revenue Service. [Tax-Exempt Status for Your Organization \(IRS Publication 557, January 2025\)](#)

outlines that exempt associations must avoid conferring private benefit, must apply internal procedures equitably to all candidates, and must ensure content-neutral communication and open access for members (pages 48 through 54).

Although the 2024 revision of the Election Commission and Campaign Rules aimed to improve clarity and structure, it left critical structural disparities unresolved. This resolution is a necessary continuation of that reform process, designed to align ADA's internal election procedures with nonprofit governance norms and ethical standards.

One of the most damaging inequities is found in Rule 6, which creates a campaign hierarchy based entirely on the timing of a candidate's announcement. Candidates who declare during the House of Delegates session are allowed full access to campaign opportunities, while those who declare later are barred from engaging with delegates outside their trustee districts. This rule favors incumbents and insiders and undermines the IRS expectation that internal elections provide equal access to participation.

Rule 8 compounds this imbalance by allowing any single candidate to veto campaign forums, interviews, or public appearances simply by declining to participate. This gives individual candidates the ability to silence others and prevents delegates from hearing all perspectives, a serious breach of member rights and a misuse of institutional neutrality. In a climate where many associations are facing scrutiny over internal bias, this kind of structural veto power poses reputational and legal risks.

The Campaign Rules also fail to address the growing problem of unregulated campaign spending. Candidates have spent six-figure amounts on their campaigns, with no reporting or limits, creating serious financial barriers to participation. Meanwhile, Rules 16 through 18 restrict affordable and modern communication tools, such as social media and third-party endorsements, further entrenching inequality. This framework discourages participation by qualified, lower-resourced members and undermines the integrity of ADA elections.

In recent years, candidates for President-elect have reported campaign expenditures exceeding \$150,000. This raises serious concerns about fiscal responsibility and fairness, especially given that the office (while respected and highly visible) does not carry broad governing authority within the ADA structure. The rising cost of campaigns risks creating an uneven playing field, where access to financial resources (rather than leadership ability, qualifications, or vision) becomes a determining factor in who can realistically run for office.

This trend also conflicts with the ADA's goals of efficiency, innovation, and inclusion. If the purpose of a campaign is to communicate a candidate's ideas and vision to members and

delegates nationwide, that can be achieved more effectively, more affordably, and with wider reach by using ADA-supported digital platforms. Virtual forums, recorded video messages, and secure online engagement allow all candidates to be heard, regardless of their campaign budget. Continuing to rely on costly travel, in-person visits, and selectively controlled invitations limits exposure for both the candidates and the members they seek to serve. A modern, digital-first approach can increase transparency, reduce spending, and bring ADA elections in line with current expectations of access and equity.

These concerns are not theoretical. Multiple candidates have faced limitations under these rules, and ADA members across the Tripartite have raised ongoing concerns about fairness and access. ADA’s *Common Ground 2025: ADA Strategic Plan (April 2021)* explicitly identifies “Commitment to Members,” “Diversity,” and “Inclusion” as core organizational values. The *Principles of Ethics and Code of Professional Conduct (as revised to October 2024)* reinforces the ethical duty of fairness under the principle of Justice and requires governance processes that promote equity and transparency.

In addition to addressing legal and ethical risks, this resolution simplifies and standardizes the ADA’s campaign rules to apply uniformly across all elective offices governed by the House of Delegates. A clear, consistent framework ensures that all candidates understand the expectations, reduces administrative confusion, and minimizes the risk of inconsistent enforcement. Uniform rules promote transparency and member trust while streamlining the campaign process across all levels of ADA leadership.

These reforms are not designed to benefit any specific candidate or faction. They are intended to ensure that all ADA members (regardless of timing, resources, or region) can participate in a process that reflects the highest standards of nonprofit governance and ethical fairness.

The proposed amendments modernize ADA election procedures, expand equitable access to candidates, encourage fiscal responsibility, and preserve ADA’s credibility as a member-driven, tax-exempt professional association.

While this proposal expands access to modern communication tools, it does not open the door to unlimited spending or unchecked campaigning. Clear contribution caps, required financial disclosures, content moderation, and platform transparency are built into the proposed rules to ensure fairness, regardless of a candidate’s resources or name recognition.

**Appendix A provides a redlined version of the amendments, Appendix B offers a clean draft, and Appendix C supplies a detailed, rule-specific justification grounded in ethical standards and IRS best practices.**

**Disclaimer:**

Although different types of 501(c) organizations serve varying purposes, all are expected by the IRS to follow core governance principles. As outlined in *Tax-Exempt Status for Your Organization (IRS Publication 557, January 2025, pp. 48–54)*, these include avoiding inurement

or private benefit, ensuring procedural fairness, and providing equitable access to participation. While the publication covers multiple types of exempt organizations, these principles apply broadly to 501(c)(6) membership associations like the ADA. The references cited in this appendix are conceptual in nature and are not intended as legal interpretations or determinations of tax compliance.

## **Amendment to the Election Commission and Campaign Rules in Chapter VI of the ADA Governance and Organizational Manual**

### **Resolved,**

That the House of Delegates adopt the *Amended 2024 Election Commission and Campaign Rules*, as shown in **Appendix A** (with deletions struck through and additions underlined), and be it further

### **Resolved,**

That the *clean version* of the Amended 2024 Election Commission and Campaign Rules, as shown in **Appendix B**, shall be the official Election Commission and Campaign Rules governing all ADA elective campaigns effective upon adoption of this resolution, and be it further

### **Resolved,**

That the amended Election Commission and Campaign Rules shall be incorporated into Chapter VI of the Governance and Organizational Manual of the American Dental Association, and be it further

### **Resolved,**

That the *Governance and Organizational Manual*, **Chapter VI. ELECTIVE OFFICERS OF THE ASSOCIATION**, Sections B.2. and B.3., be amended as follows, with **strike-through** indicating deletion and **underline** indicating addition:

## **Section B.2. – Treasurer**

The search for Treasurer shall be announced in an official publication of the Association in November of the final year of the incumbent Treasurer's term, together with the recommended qualifications for that position as provided in the Bylaws.

Candidates for the office of Treasurer shall apply by submitting a standardized Treasurer Curriculum Vitae form to the Executive Director at least one hundred twenty (120) days prior to the convening of the House of Delegates.

Each candidate's application shall be reviewed by the Board of Trustees.

At least sixty (60) days prior to the convening of the House of Delegates, the Executive Director shall provide all members of the House of Delegates with each candidate's standardized Treasurer CV and the Board's determination as to whether the candidate meets the recommended qualifications.

No other candidate shall be nominated from the floor.

~~Nominations shall be made in accordance with the order of business and may be followed by a four minute acceptance speech. Seconding a nomination is not permitted.~~

**All campaign activities for the office of Treasurer shall be conducted in accordance with the ADA Campaign and Election Rules as adopted by the House of Delegates.**

### **Section B.3. – Speaker of the House of Delegates**

The Speaker of the House of Delegates shall be elected by the House of Delegates from among eligible candidates.

The term of office for the Speaker shall be three (3) years, and the Speaker may be reelected to successive terms.

~~Nominations for Speaker of the House of Delegates shall be made in accordance with the order of business, and may be followed by an acceptance speech not to exceed four (4) minutes.~~

~~Seconding a nomination is not permitted.~~

**All candidates for Speaker of the House of Delegates shall be nominated, announced, and permitted to campaign in accordance with the ADA Campaign and Election Rules as adopted by the House of Delegates.**

**Appendix A – Redlined Version of Amended Election Commission and Campaign Rules**

*Text in strike-through represents deletions from the current rules.*

*Text that is underlined represents new additions.*

*All other text remains unchanged from the 2024 adopted version.*

**Election Commission and Campaign Rules**

The following Campaign Rules govern the announcement and conduct of campaigns for ADA elective officers. These Campaign Rules will be distributed annually to all candidates, delegates, alternate delegates and other parties of interest. Candidates for elective officers are expected to abide by the Campaign Rules. These Campaign Rules shall also apply to any individual who has not yet formally declared candidacy but has taken substantive steps indicating an intent to run for elective office, including but not limited to campaign planning, fundraising, or public discussion of their potential candidacy. Such individuals shall be bound by the same ethical, financial, and procedural standards outlined in this document.

**Procedures Concerning Interpretation and Distribution of the Campaign Rules**

1. To the extent one or more candidates has a question concerning the interpretation of the Campaign Rules or whether a particular activity is prohibited or permitted under the Campaign Rules, the following procedures shall be followed:
  - ~~a. Prior to contacting the Election Commission concerning the question or interpretation, candidates and/or their campaign managers shall communicate and attempt in good faith to reach a consensus on the question.~~
  - a. Any declared candidate or campaign representative may submit a question directly to the Election Commission without the need for prior discussion with other candidates.
  - ~~b. If a consensus cannot be reached:~~
    - ~~i. The campaign that raised the issue shall contact the Election Commission (copying the other candidates and their campaign managers) via a brief and succinct email, state the question or interpretation that has arisen and that the campaigns were unable to reach a consensus on the issue and provide the campaign's position on the issue presented.~~
    - b. Any communications from a candidate to the Election Commission regarding these Campaign Rules shall be submitted to the chair of the Election Commission via email addressed to [electioncommission@ada.org](mailto:electioncommission@ada.org) or by such other means as the Election Commission may from time-to-time specify. All declared candidates will receive a copy of all communications. Such copies shall be provided within three (3) business days of receipt by the Chair.
    - ~~ii. Within three business days of the receipt of the email referenced in Paragraph b.i, above, any other campaign desiring to do so shall send the Election Commission a brief and succinct email setting forth that campaign's position on the question or interpretation presented to the Election Commission.~~
  - c. Other candidates may provide their input within three (3) business days. The Election Commission shall issue a written opinion within five (5) business days of the close of the candidate input period and provide it to all declared candidates. All

**opinions shall be posted in the House of Delegates Library on ADA Connect. Opinions shall not disqualify any candidate from continued campaigning or appearing on the ballot. Final authority regarding any consequences rests with the House of Delegates.**

2. ~~Any communications from a candidate to the Election Commission regarding these Campaign Rules shall be submitted to the chair of the Election Commission via email addressed to [electioncommission@ada.org](mailto:electioncommission@ada.org) or by such other means as the Election Commission may from time to time specify.~~
3. Each year, a copy of the current Campaign Rules shall be distributed, signed and acknowledged by all ADA trustees and elective officers with the agenda and organizational material provided at the first meeting of the Board of Trustees following adjournment of the House of Delegates. It is the responsibility of each candidate to inform their campaign committee members, the constituent Executive Directors within their trustee districts and other constituent staff within their trustee districts who are assisting the campaign of these Campaign Rules within fourteen (14) days of the candidate's formation of a campaign committee or announcement of candidacy, whichever first occurs.  
**The current Campaign Rules shall also be made available to all members via ADA Connect and [www.ada.org](http://www.ada.org) to support transparency.**
4. ~~In order to better familiarize ADA delegates and alternate delegates with the Campaign Rules, a succinct summary of the most important portions of the Campaign Rules will be posted each year in the House of Delegates library on ADA Connect.~~

### **Agreements Between Candidates**

5. ~~Candidates can negotiate and enter into any agreement concerning the conduct of a campaign for elective officer that does not contravene and is not in conflict with any of the Campaign Rules contained herein; agreements between candidates that narrow any of the provisions of these Campaign Rules or agreements by which the candidates forego any campaign activities permitted under these Campaign Rules are permissible.~~

**Candidates may engage in good-faith coordination regarding campaign schedules, shared forums, and travel logistics, provided that such agreements do not restrict access to campaign activities, reduce public communications, or create private advantages unavailable to other candidates. Agreements that would narrow or waive campaign rights outlined in these Rules shall be nonbinding and unenforceable. All candidates are encouraged to disclose any formal coordination to the Election Commission to preserve procedural fairness.**

~~The negotiation and enforcement of any such agreement will be the responsibility of the candidates. The Election Commission will neither facilitate nor enforce any such agreement.~~

**The Election Commission shall not facilitate or enforce private agreements among candidates and reserves the right to disregard agreements that impair the fairness, transparency, or neutrality of the election process.**

## Announcing Candidacy

6. Candidates **for any elected position** ~~President-elect and Second Vice President~~ may formally announce their intent to run for office on the final day of the annual session immediately preceding their candidacy, **or any time after**. A formal announcement shall include, at a minimum, the name of the candidate and an identification of the office being sought. Prior to this formal announcement, candidates may freely campaign within their own trustee districts. Campaign activities outside a candidate's own trustee district shall begin only after the official announcement ~~at the annual session~~. ~~Candidates for President-elect and Second Vice President not formally announcing their candidacies on the last day of the annual session immediately preceding their candidacy shall not be permitted to campaign outside their own trustee districts but shall be permitted to be nominated for elective office at the annual session of the House of Delegates pursuant to Chapter VI., Section B.1. of the Governance Manual of the American Dental Association (Governance Manual).~~ **Once declared to the Election Commission in writing, candidates are permitted to campaign without geographic restrictions. All nominating speeches shall be posted on ADA.org.**
7. ~~Announcements of candidacies for the offices of Treasurer and Speaker of the House of Delegates shall be as stated in Chapter VI. Section B.2. and B.3., respectively, of the Governance Manual.~~ **Announcements of candidacies for the offices of Treasurer and Speaker of the House of Delegates shall follow the procedures outlined in Chapter VI, Sections B.2. and B.3. of the Governance Manual. These candidates shall also be subject to the same transparency and disclosure requirements as other declared candidates under these rules.**

## Travel and Meeting Attendance

8. Candidates ~~for the office of President-elect~~ shall limit their campaign travel to attending state and/or district annual meetings and/or leadership conferences and annual session district caucus meetings to which all candidates, **for the same office**, have been invited. **Candidates may also accept invitations from other recognized ADA-affiliated or professional organizations, provided that such invitations are extended to all declared candidates for the same office .**
- a. ~~Candidates for the office of President-elect may accept and attend any such event in a manner mutually agreed upon but only if all candidates have been invited.~~  
**a. Candidates may attend such events if all declared candidates are given equal opportunity to participate. Coordination among campaigns is encouraged but not required for acceptance.**
- b. ~~District caucuses and state constituent societies shall issue timely invitations to the President-elect candidates through the Office of the Executive Director.~~  
**b. Invitations for campaign appearances shall be sent directly and simultaneously to all declared candidates of the same office and their campaign managers, with a copy provided to the Office of the Executive Director for coordination and**



**recordkeeping.**

~~c. President-elect candidates shall negotiate a mutually agreeable travel schedule. It is the responsibility of the candidate and/or the campaign managers, through coordination among the campaigns, to determine the candidates' availability and respond directly to the inviting organizations. Except for conflicts due to a religious holiday observed by one or more of the candidates, candidates shall vote on whether to accept an invitation, with a majority needed to accept; a tie vote will result in accepting the invitation. A religious holiday conflict with a single candidate shall result in all the candidates declining the invitation.~~

~~d. Candidates who have scheduling conflicts prohibiting personal attendance at a district or caucus event may, at their option, participate in the event via electronic audio or audiovisual means available to both the candidate and the event's sponsor.~~

~~e. After a meeting has been accepted, if an emergency arises and a candidate must cancel their attendance, the remaining candidates may attend as planned. Candidates who cancel their attendance at an event due to an emergency may, at their option, participate in the event via electronic audio or audiovisual means available to both the candidate and the event's sponsor.~~

**c. Candidates are encouraged to coordinate their schedules in good faith and respond directly to the inviting organizations. In the event that a candidate is unable to attend a district or caucus event due to a religious holiday, scheduling conflict, or last-minute emergency, they shall have the option to participate virtually through audio or audiovisual means, or to submit pre-recorded remarks. The format and duration of such participation shall be comparable to what is provided to other candidates, as determined by the host organization. The remaining candidates may proceed with the event as planned.**

9. ~~Candidates for the offices of Second Vice President, Treasurer and Speaker of the House of Delegates shall limit campaign travel to attending the district caucus meetings held during the ADA Annual Session.~~

~~a. District and state caucuses are permitted to hold virtual candidate meetings with candidates for Second Vice President, Treasurer and Speaker of the House of Delegates ("virtual candidate forums") during the two-month period immediately preceding the commencement of the Annual Session of the House of Delegates. The virtual candidate meetings are to be held via a videoconference platform such as Zoom, Webex, Teams, or a similar platform. **To encourage fiscal responsibility, all candidates may use virtual audio or audiovisual means to campaign and answer questions at any time to any extent after their candidacy announcement.**~~

~~b. District caucuses and state constituent societies choosing to hold virtual candidate meetings shall issue timely invitations to the candidates for Second Vice President, Treasurer and Speaker of the House of Delegates through the Office of the Executive Director. Invitations for virtual candidate meetings must be issued to all candidates running for the particular elective office(s) for which virtual candidate visits are desired; the invitations should specify the type of meeting that will be held (one-on-one, candidate~~

forum, etc.). District caucuses are urged to collaborate in the dates and times for the virtual candidate forums so that scheduling conflicts are avoided if possible.

**c. Virtual campaign appearances, interviews, or forums by all candidates may also be hosted by any organization, provided all declared candidates for the office in question are given equal notice and opportunity to participate.**

e. Candidates for the offices of Second Vice President, Treasurer and Speaker of the House of Delegates may accept and attend any such event in a manner mutually agreed upon, but only if all candidates have been invited. It is the responsibility of the candidates and/or the campaign managers, through coordination among the campaigns, to determine the candidates' availability and respond directly to the inviting organizations.

**d. . Invitations for virtual campaign appearances shall be sent directly to all declared candidates of the same office and their campaign managers, with a copy provided to the Office of the Executive Director for coordination and recordkeeping. Candidates may respond directly to invitations for virtual events. Coordination is encouraged but shall not be required.** After a virtual candidate forum **that is intended for all candidates**, has been accepted by a candidate, if a situation arises that requires the candidate to cancel their attendance, the remaining candidates may participate as planned. **Any candidate is free to decline any invitation and may submit a pre-recorded message with permission from the host. Hosts are encouraged to accept pre-recorded messages when a candidate cannot attend live, as long as the same option is offered to all candidates.**

10. Caucuses and state meetings are requested to provide an appropriate opportunity for the candidates to meet with their members. It is recommended that such forums be structured to allow:
  - a. All candidates to make presentations;
  - b. Caucuses freedom to assess candidates; and
  - c. Each candidate to respond to questions.
11. Notwithstanding any of these Campaign Rules, nothing in these Rules shall prevent a candidate from traveling on a personal basis or attending a meeting, conference or other event as an official ADA representative. Campaigning while personally traveling or attending events as an ADA representative is strictly prohibited. When traveling personally or as an ADA representative, candidates shall notify other candidates of such travel as soon as possible once the travel has been scheduled.
12. Candidates shall not use campaign-sponsored social functions or hospitality suite/meeting rooms on behalf of their candidacy at any regional, national or annual meeting. (This is not intended, however, to limit candidates from holding campaign meetings for the purpose of strategizing.) Campaign receptions are not to be held at the ADA Annual

Session. Additionally, a district that hosts a reception during the ADA annual session and is sponsoring a candidate in a contested election shall not host the reception prior to the officer elections; a reception may be held after the election. Prior to the election, candidates shall not attend events in or visit district hospitality suites. This prohibition shall not apply to a candidate visiting his or her own district's hospitality suite or attending events hosted by their own district exclusively for the district's members.

**Districts and caucuses are encouraged to fully utilize virtual appearances before the Annual Session to allow delegates to ask questions and get to know the candidates. All declared candidates in each race should be invited to participate. This approach promotes equal access while helping limit costs and support fiscal responsibility.**

## Publications and Media

13. ~~News articles on and interviews of a candidate are permissible if published by a state dental journal. Online state dental journal news articles on and interviews of a candidate are permissible. Articles about a candidate's intention to run for office are permissible. Articles about why one person would make a better candidate are not permissible.~~

**Candidates may participate in news articles or interviews published in print or online journals provided that equal opportunity is extended to all candidates upon request. Hosts are encouraged to document in writing that all declared candidates were offered the same opportunity; candidates shall retain that documentation for review by ADA staff if questions arise.**

14. ~~When announcing their candidacy for elective officer, except for the candidate's constituent and component, candidates shall notify all organizations and groups to which they belong of their candidacy and shall request that during the campaign such organizations and groups refrain from distributing or publishing any information or material refereneing the campaign or the candidate's candidacy.~~

**Candidates shall disclose their candidacy to any organizations or groups to which they belong and may request such groups not campaign on their behalf unless equal access is provided to all other candidates for that office.**

15. ~~Candidates shall not participate in interviews on their leadership capacity with leadership or national journals that will be published within the timeframe of their campaign. Candidates shall not knowingly seek to have their name, photo, appearance, and writings published in national trade or non-peer reviewed publications or websites during the campaign, and shall avoid submitting articles in non-peer reviewed paper or electronic publications. Candidates who are participants in a speaker's bureau or earn revenue by speaking nationally or regionally shall avoid all unnecessary self-promotion during the campaign related to national speaking engagements.~~

**Candidates may participate in interviews and publications provided the subject matter is relevant to their professional expertise and not used for campaign messaging. National appearances, publications, or speaker engagements must not include endorsements or campaign solicitations. Campaign-related media must be**

**disclosed to the Election Commission and other candidates when scheduled, and equal access must be offered to others upon request.**

### **Use of Social Media**

16. In order to facilitate providing information to delegates and alternate delegates by candidates, after announcement of their candidacy, any candidate may establish a closed group Facebook page for purposes of disseminating information about the candidate's campaign and interacting with delegates and alternate delegates concerning campaign-related subjects and issues. Any such closed group Facebook page instituted by a candidate shall comply with these Campaign Rules and shall also be governed by the ADA's Social Media Policy and the Social Media Posting Protocol for ADA Officers and Trustees. In the event of a conflict between these Campaign Rules, the Social Media Policy and the Social Media Posting Protocol for ADA Officers and Trustees, these Campaign Rules control.

**Candidates may use campaign-specific social media pages, podcasts, or online platforms to communicate with delegates and alternate delegates, provided access is offered equitably to all declared candidates and campaign-related content complies with the ADA Code of Ethics and these Rules. This approach promotes equal access and expanded exposure while helping limit costs and support fiscal responsibility.**

a. The Election Commission will determine the appropriate administrative settings for the closed group campaign Facebook page that candidates may use for campaign-related posts. Those settings will be communicated by the Election Commission to the candidates shortly after the candidates announce their intention to run for elective officer. **Candidates shall notify the Election Commission of the digital platforms they intend to use for campaign communications and agree to maintain basic content moderation to ensure compliance with ADA rules.**

b. Only delegates, alternate delegates, campaign staff and Election Commission members and staff shall be invited to join a candidate's closed group campaign Facebook page. **Candidates may invite certified delegates, alternate delegates, campaign staff, and ADA observers to their campaign platforms.**

c. Shortly after a candidate's candidacy is announced, the ADA will provide the known email addresses of delegates and alternate delegates. Using that list, invitations to join the closed group page may be issued via email by a candidate who wishes to initiate a closed group campaign Facebook page. Invitations to join the closed group page may also be sent to the candidate's campaign staff and shall be sent to members and staff of the Election Commission. **Within 14 days of candidate declaration, the ADA shall provide candidates with a current delegate and alternate delegate list. Candidates may use this list to distribute digital invitations to their campaign platforms.**

d. Following the compilation of the list of certified delegates and alternate delegates who will attend the House of Delegates session at which the election will occur, the ADA will send the candidate an updated list of certified delegates and alternate delegates that the candidate may use to send a second closed group campaign Facebook page invitation so that newly listed delegates and alternate delegates may join the candidate's closed group campaign Facebook page. **A second invitation may be sent using the most current official delegate list available from ADA staff, no later than 21 days prior to the House of Delegates session. If a more updated list becomes available within that period, campaigns are encouraged to send it again.**

e. Only material that is relevant to the campaign shall be posted on a candidate's closed-group campaign Facebook page. No posts that are negative to any opposing candidate or that may be considered to be negative campaigning shall be permitted on the closed-group campaign page. Any candidate who develops a closed-group campaign Facebook page shall be responsible for the monitoring of posts to the page to ensure that posts comply with these Campaign Rules and that the posts are consistent with the ADA's Social Media Policy and the Social Media Posting Protocol for ADA Officers and Trustees. **Candidates are responsible for ensuring that campaign-related content is accurate, relevant, and not defamatory. Campaign platforms must designate a moderator and comply with ADA Code of Ethics provisions on fairness and veracity.**

f. No surveys or polls shall be used or conducted via a candidate's closed-group campaign Facebook page. **Candidates shall not conduct surveys, polls, or vote-solicitation campaigns through their campaign platforms unless such tools are offered identically to all candidates by ADA.**

g. Interactions between a candidate and delegates and alternate delegates using the candidate's closed-group campaign Facebook page shall not count toward any limits on a candidate's contact with individual delegates and alternate delegates contained in these Campaign Rules. 16. Except for the closed-group campaign activity on Facebook specified in Paragraph 15, above, there shall be no campaigning using any social media platform or application. **Interactions on declared digital campaign platforms shall not count toward contact limits, but must remain public and viewable to all members of that platform.**

h. **Candidates may participate in interviews, podcasts, livestreams, forums, or digital communications hosted by independent platforms not affiliated with the ADA, including professional publications, podcasts, Facebook groups, or dental community pages. Participation in such media shall not require the consent of other candidates. A candidate's refusal to participate shall not prohibit others from accepting the same invitation. Prior to publication or broadcast, the host or moderator of any independent media appearance must send a written confirmation (such as an email) to the Office of the Executive Director, affirming that the opportunity to participate was extended to all declared candidates for the applicable race. All content must comply with the ADA Code of Ethics, including the principles of fairness and veracity.**

17. Except for the closed-group campaign activity on Facebook specified in Paragraph 14, above, there shall be no campaigning using any social media platform or application. **The Election Commission shall not restrict participation in independent platforms, provided ADA rules and candidate ethics are upheld.**

18. Personal, non-campaign use of social media by candidates during the campaign for elective officer is permitted but candidates shall not post information or material relating to the campaign on personal social media sites. Candidates shall review their personal social media site settings to ensure that privacy and security settings are set to allow review and deletion of any third-party post, and candidates shall frequently monitor their own personal Facebook pages and other personal social media sites and delete any posts that reference the campaign or the candidate's campaign activities or posts that can be tagged for distribution to third-party sites.

**Candidates may use personal social media accounts for campaign-related posts, provided those posts follow all applicable campaign rules. Candidates are responsible for the content they post and are encouraged to monitor comments and tags that may violate ADA campaign policies. Campaign messages shared on personal pages should be publicly visible and accessible to all delegates.**

## **Campaign Literature and Communications to Delegates and Alternate Delegates**

19. No printed campaign-related material may be distributed in the House of Delegates or to delegates and alternate delegates.

20. Candidates may prepare a piece of campaign literature to be electronically distributed to the delegates and alternate delegates following a candidate's announcement of candidacy for elective officer. Such campaign literature shall be sized so that if printed the literature is no larger than four single-sided sheets of 8½ x 11 inch paper. If desired, a second piece of campaign literature or similar length may be electronically distributed to the delegates and alternate delegates following the candidates' receipt from the ADA of the final list of certified delegates and alternate delegates.

21. Each candidate may prepare a video to be distributed as described below to delegates and alternate delegates and other members of the House of Delegates.

22. Candidate brochures, videos or other campaign-related communications can include photographs and likenesses of the candidate but shall not include any photograph, likeness or mention of any other current officer of the ADA or current member of the ADA Board of Trustees.

~~23. Each piece of literature and any video developed by any candidate shall be submitted to the ADA for review and approval prior to being distributed. Such literature review may take up to five (5) business days to complete. Video reviews will be completed as quickly as possible but are dependent on the length of the video.~~ **Each candidate shall submit campaign literature and video to the ADA's election commission for review to ensure compliance with accessibility and formatting standards. The election commission may provide recommendations or flag concerns but will not require formal approval prior to distribution.** The candidates shall obtain permissions to use the likeness or image of any non-familial third party that appears in a piece of campaign literature or in any video. Candidates shall state that such permissions have been obtained when submitting the literature and any video for review. The permission should be retained by the candidates and submitted to the ADA only if requested.

24. Each candidate is permitted to individually communicate with each delegate and alternate delegate a ~~single~~ **three** times via an electronic communication (i.e., email) for the purpose of campaigning, electioneering and soliciting votes following the receipt from the ADA of the list of certified delegate and alternate delegate contact information. A third party vendor may be used to send such electronic communications so long as the privacy of the email addresses and identities of the recipients are maintained and preserved and there is no ability to reply to all the recipients of the electronic communication. At each candidate's option, the candidate's electronic communication may contain the campaign literature and/or video referenced in these Campaign Rules, either by embedding or attaching the literature and/or the video to the electronic communication or by providing a hyperlink or hyperlinks that connect to the literature and/or the video that is stored in a remote location maintained by or on behalf of the candidate.

25. Each campaign is permitted to individually initiate a telephonic (phone call or text) communication with each delegate and alternate delegate a ~~single~~ **three** times for the purpose of

1 campaigning, electioneering and soliciting votes following the receipt from the ADA of the list of  
2 certified delegate and alternate delegate contact information.

3 26. Nothing in these Campaign Rules shall prevent a candidate from communicating regarding  
4 matters within the specific duties of the candidate's position as an ADA officer, member of the Board  
5 of Trustees, task force or work group, as long as the communication is strictly related to such  
6 responsibilities and is not used for campaigning, electioneering or soliciting votes.

7 27. Candidates may each schedule up to three (3) telephone or video conferencing forums or town  
8 hall events during the campaign. A candidate desiring to hold up to three (3) telephone or video  
9 conferencing forums or town hall events shall communicate to the ADA the date of each event and the  
10 times at which each such event shall commence and end, together with the instructions and contact  
11 information necessary for participants to email and/or call with the questions they would like asked  
12 during the telephonic town hall. The ADA will announce the telephone or video conferencing town hall  
13 information to delegates and alternate delegates via ADA Connect and provide the information to the  
14 Election Commission members and staff. Candidates may also publicize the telephonic town halls they  
15 sponsor on any media closed-group-campaign-Facebook-page that they maintain.

16 28. The agenda for a candidate's telephonic town hall meeting(s) shall be the prerogative of the  
17 candidate, with the candidates being permitted to provide opening and closing statements and  
18 whether follow-up questions are permitted. The length of the telephonic town hall event is also  
19 discretionary with the candidate.

20 29. ~~No negative campaigning or negative comments concerning opposing candidates shall be~~  
21 ~~permitted to be made by the candidate or any participant posing questions or making comments~~  
22 ~~during the town hall event. Candidates shall be responsible for ensuring that a screening mechanism~~  
23 ~~is employed during the town hall event so that broadcasting participant comments or questions that~~  
24 ~~violate this provision is avoided.~~ **Candidates are expected to maintain a respectful tone**  
25 **during town halls and may use a moderator to manage questions and content. Offensive**  
26 **or defamatory comments are discouraged, but candidates shall not be held responsible**  
27 **for unscripted audience remarks beyond their control.**

## 28 Contributions

29 30. ~~Contributions (including money and in-kind services) are acceptable only from individual dentists,~~  
30 ~~family members and ADA constituent and component dental societies, which includes component~~  
31 ~~branches and study clubs recognized as part of the constituent society. Contributions from any other~~  
32 ~~sources are not permissible. No candidate will knowingly accept campaign contributions which create~~  
33 ~~the appearance of conflict of interest as reflected in the ADA Bylaws.~~ **Contributions (including**  
34 **money and in-kind services) may only be accepted from individual dentists, family**  
35 **members, and ADA constituent or component dental societies (including study clubs and**  
36 **branches recognized by a constituent society).** **Contributions from any other source are**  
37 **not permissible. No candidate shall knowingly accept any contribution that creates the**  
38 **appearance of a conflict of interest as defined in the ADA Bylaws. Total contributions from**  
39 **any individual donor (including family members, friends, or colleagues) shall not exceed**  
40 **\$2,500 per election cycle. Total contributions from any ADA constituent or component**  
41 **society shall not exceed \$10,000 per candidate. All contributions over \$500, including**  
42 **self-funding and in-kind support, must be disclosed to the Election Commission within 10**  
43 **business days of receipt. Because contributions from constituent and component societies**  
44 **may come from membership dues, all such support must be transparently reported and**

**made accessible to ADA members through appropriate posting on ADA Connect and the candidate's campaign website, if applicable.**

31. The sending of a brief note acknowledging a financial contribution or thanking a host of a campaign event to those contributors or hosts outside of the candidate's district is permitted, as long as no additional campaign message is included. Such thank you notes may be sent on campaign letterhead or a notecard containing the campaign logo; envelopes for the thank you note may contain an identification of the campaign or the campaign logo.

32. Any contribution source that could be interpreted to be a conflict of interest or creates the appearance of a conflict of interest must be reported to the Election Commission and the ADA Board of Trustees. In the event a contribution source is deemed to be a conflict of interest or creates the appearance of a conflict of interest, the candidates will be required to return the contribution.

~~Candidates for all ADA elective offices should submit a summary of campaign contributions and expenses to the Election Commission at the end of the campaign.~~ **Candidates for all ADA elective offices shall submit a monthly detailed report of all campaign contributions and expenses to the Election Commission by the 15<sup>th</sup> of the following month. The report shall include all contributions (regardless of amount), in-kind services, and expenditures. Campaigns shall also provide a summary of total funds raised and spent by the first of each month during the campaign period. These monthly summaries shall be posted by the Election Commission in the House of Delegates Library on ADA Connect for ADA member access.**

#### **Violations**

34. In the event a violation of the Campaign Rules is determined by the Election Commission to have occurred more than fourteen (14) days prior to the House of Delegates convening, then the Election Commission, if it cannot resolve the violation between the candidates, shall post a report of the violation in the House of Delegates section on ADA Connect. In addition, an email reporting on any such violations will be sent by the Election Commission to each certified delegates and alternate delegates with a working email address on file with the ADA on or about fourteen (14) days prior to the convening of the House of Delegates. **Prior to public reporting of any violation, the Election Commission shall notify the candidate in writing and allow a reasonable opportunity to respond. Any candidate named in a public violation report shall be given the opportunity to submit a written or oral response, which shall be made available to the House of Delegates alongside the original report.**

35. In the event a violation of the Campaign Rules is determined by the Election Commission to have occurred in the period from fourteen (14) days prior to the convening of the House of Delegates through the elections of elective officers, then the Election Commission, if it cannot resolve the violation between the candidates, shall report those violations to the House of Delegates. The report will be given orally by the Election Commission chair (or a designee of the Election Commission if the chair is absent from the House of Delegates session) at the first meeting of the House. If violations occur after that meeting, and before the election, then a report of such violations shall be read to each caucus by a designee of the Election Commission. **The candidate shall also be offered an opportunity to respond orally or in writing prior to or during the same session in which the violation is reported.**

36. Should an allegation of a Campaign Rules violation against an individual or entity not affiliated with a campaign be made, the Election Commission shall review the allegation and determine if a violation has occurred. If so, the campaign and candidate affected by the infraction will be notified,



and shall be responsible for contacting the individual or entity involved and using their best efforts to curtail the violation.

37. In addition to the foregoing notifications of violations, all violations of the Campaign Rules that occur shall be reported orally at the House of Delegates meeting by the Election Commission. **The ADA encourages all delegates to review reported violations and candidate responses when casting votes, as ethical campaign conduct reflects integrity in leadership.**

October 2024

**Appendix B – Clean Version of the Amended Election Commission and Campaign Rules**  
**This version reflects all proposed amendments incorporated as final language, with all strike-throughs and underlining removed. If adopted, this version will become the official Election Commission and Campaign Rules as part of Chapter VI of the ADA Governance and Organizational Manual.**

**Election Commission and Campaign Rules**

The following Campaign Rules govern the announcement and conduct of campaigns for ADA elective officers. These Campaign Rules will be distributed annually to all candidates, delegates, alternate delegates and other parties of interest. Candidates for elective officers are expected to abide by the Campaign Rules. These Campaign Rules shall also apply to any individual who has not yet formally declared candidacy but has taken substantive steps indicating an intent to run for elective office, including but not limited to campaign planning, fundraising, or public discussion of their potential candidacy. Such individuals shall be bound by the same ethical, financial, and procedural standards outlined in this document.

**Procedures Concerning Interpretation and Distribution of the Campaign Rules**

1. To the extent one or more candidates has a question concerning the interpretation of the Campaign Rules or whether a particular activity is prohibited or permitted under the Campaign Rules, the following procedures shall be followed:
  - a. Any declared candidate or campaign representative may submit a question directly to the Election Commission without the need for prior discussion with other candidates.
  - b. Any communications from a candidate to the Election Commission regarding these Campaign Rules shall be submitted to the chair of the Election Commission via email addressed to [electioncommission@ada.org](mailto:electioncommission@ada.org) or by such other means as the Election Commission may from time-to-time specify. All declared candidates will receive a copy of all communications. Such copies shall be provided within three (3) business days of receipt by the Chair.
  - c. Other candidates may provide their input within three (3) business days. The Election Commission shall issue a written **opinion** within five (5) business days of the close of the candidate input period and provide it to all declared candidates. All opinions shall be posted in the House of Delegates Library on ADA Connect. **Opinions shall not disqualify any candidate from continued campaigning or appearing on the ballot. Final authority regarding any consequences rests with the House of Delegates.**
2. Each year, a copy of the current Campaign Rules shall be distributed, signed and acknowledged by all ADA trustees and elective officers with the agenda and organizational material provided at the first meeting of the Board of Trustees following adjournment of the House of Delegates. It is the responsibility of each candidate to inform their campaign committee members, the constituent Executive Directors within their trustee districts and

other constituent staff within their trustee districts who are assisting the campaign of these Campaign Rules within fourteen (14) days of the candidate's formation of a campaign committee or announcement of candidacy, whichever first occurs. The current Campaign Rules shall also be made available to all members via ADA Connect and [www.ada.org](http://www.ada.org) to support transparency.

### **Agreements Between Candidates**

3. Candidates may engage in good-faith coordination regarding campaign schedules, shared forums, and travel logistics, provided that such agreements do not restrict access to campaign activities, reduce public communications, or create private advantages unavailable to other candidates. Agreements that would narrow or waive campaign rights outlined in these Rules shall be nonbinding and unenforceable. All candidates are encouraged to disclose any formal coordination to the Election Commission to preserve procedural fairness.

The Election Commission shall not facilitate or enforce private agreements among candidates and reserves the right to disregard agreements that impair the fairness, transparency, or neutrality of the election process.

### **Announcing Candidacy**

4. Candidates for any elected position may formally announce their intent to run for office on the final day of the annual session immediately preceding their candidacy, or any time after. A formal announcement shall include, at a minimum, the name of the candidate and an identification of the office being sought. Prior to this formal announcement, candidates may freely campaign within their own trustee districts. Campaign activities outside a candidate's own trustee district shall begin only after the official announcement. Once declared to the Election Commission in writing, candidates are permitted to campaign without geographic restrictions. All nominating speeches shall be posted on ADA.org.

5. Announcements of candidacies for the offices of Treasurer and Speaker of the House of Delegates shall follow the procedures outlined in Chapter VI, Sections B.2. and B.3. of the Governance Manual. These candidates shall also be subject to the same transparency and disclosure requirements as other declared candidates under these rules.

### **Travel and Meeting Attendance**

6. Candidates shall limit their campaign travel to attending state and/or district annual meetings and/or leadership conferences and annual session district caucus meetings to which all candidates, for the same office, have been invited.

Candidates may also accept invitations from other recognized ADA-affiliated or professional organizations, provided that such invitations are extended to all declared candidates for the same office .

a. Candidates may attend such events if all declared candidates are given equal opportunity to participate. Coordination among campaigns is encouraged but not required for acceptance.

b. Invitations for campaign appearances shall be sent directly and simultaneously to all declared candidates of the same office and their campaign managers, with a copy provided to the Office of the Executive Director for coordination and recordkeeping.

c. Candidates are encouraged to coordinate their schedules in good faith and respond directly to the inviting organizations. In the event that a candidate is unable to attend a district or caucus event due to a religious holiday, scheduling conflict, or last-minute emergency, they shall have the option to participate virtually through audio or audiovisual means, or to submit pre-recorded remarks. The format and duration of such participation shall be comparable to what is provided to other candidates, as determined by the host organization. The remaining candidates may proceed with the event as planned.

7. To encourage fiscal responsibility, all candidates may use virtual audio or audiovisual means to campaign and answer questions at any time to any extent after their candidacy announcement. Virtual campaign appearances, interviews, or forums by all candidates may also be hosted by any organization, provided all declared candidates for the office in question are given equal notice and opportunity to participate. Invitations for virtual campaign appearances shall be sent directly to all declared candidates of the same office and their campaign managers, with a copy provided to the Office of the Executive Director for coordination and recordkeeping. Candidates may respond directly to invitations for virtual events. Coordination is encouraged but shall not be required. After a virtual candidate forum that is intended for all candidates, has been accepted by a candidate, if a situation arises that requires the candidate to cancel their attendance, the remaining candidates may participate as planned. Any candidate is free to decline any invitation and may submit a pre-recorded message with permission from the host. Hosts are encouraged to accept pre-recorded messages when a candidate cannot attend live, as long as the same option is offered to all candidates.
8. Caucuses and state meetings are requested to provide an appropriate opportunity for the candidates to meet with their members. It is recommended that such forums be structured to allow:
  - a. All candidates to make presentations;
  - b. Caucuses freedom to assess candidates; and
  - c. Each candidate to respond to questions.
9. Notwithstanding any of these Campaign Rules, nothing in these Rules shall prevent a candidate from traveling on a personal basis or attending a meeting, conference or other event as an official ADA representative. Campaigning while personally traveling or attending events as an ADA representative is strictly prohibited. When traveling personally or as an ADA representative, candidates shall notify other candidates of such travel as soon as

possible once the travel has been scheduled.

10. Candidates shall not use campaign-sponsored social functions or hospitality suite/meeting rooms on behalf of their candidacy at any regional, national or annual meeting. (This is not intended, however, to limit candidates from holding campaign meetings for the purpose of strategizing.) Campaign receptions are not to be held at the ADA Annual Session. Additionally, a district that hosts a reception during the ADA annual session and is sponsoring a candidate in a contested election shall not host the reception prior to the officer elections; a reception may be held after the election. Prior to the election, candidates shall not attend events in or visit district hospitality suites. This prohibition shall not apply to a candidate visiting his or her own district's hospitality suite or attending events hosted by their own district exclusively for the district's members. Districts and caucuses are encouraged to fully utilize virtual appearances before the Annual Session to allow delegates to ask questions and get to know the candidates. All declared candidates in each race should be invited to participate. This approach promotes equal access while helping limit costs and support fiscal responsibility.

#### **Publications and Media**

11. Candidates may participate in news articles or interviews published in print or online journals provided that equal opportunity is extended to all candidates upon request. Hosts are encouraged to document in writing that all declared candidates were offered the same opportunity; candidates shall retain that documentation for review by ADA staff if questions arise.

12. Candidates shall disclose their candidacy to any organizations or groups to which they belong and may request such groups not campaign on their behalf unless equal access is provided to all other candidates for that office.

13. Candidates may participate in interviews and publications provided the subject matter is relevant to their professional expertise and not used for campaign messaging. National appearances, publications, or speaker engagements must not include endorsements or campaign solicitations. Campaign-related media must be disclosed to the Election Commission and other candidates when scheduled, and equal access must be offered to others upon request.

#### **Use of Social Media**

14. Candidates may use campaign-specific social media pages, podcasts, or online platforms to communicate with delegates and alternate delegates, provided access is offered equitably to all declared candidates and campaign-related content complies with the ADA Code of Ethics and these

Rules. This approach promotes equal access and expanded exposure while helping limit costs and support fiscal responsibility.

a. Candidates shall notify the Election Commission of the digital platforms they intend to use for campaign communications and agree to maintain basic content moderation to ensure compliance with ADA rules.

b. Candidates may invite certified delegates, alternate delegates, campaign staff, and ADA observers to their campaign platforms.

c. Within 14 days of candidate declaration, the ADA shall provide candidates with a current delegate and alternate delegate list. Candidates may use this list to distribute digital invitations to their campaign platforms.

d. A second invitation may be sent using the most current official delegate list available from ADA staff, no later than 21 days prior to the House of Delegates session. If a more updated list becomes available within that period, campaigns are encouraged to send it again.

e. Candidates are responsible for ensuring that campaign-related content is accurate, relevant, and not defamatory. Campaign platforms must designate a moderator and comply with ADA Code of Ethics provisions on fairness and veracity.

f. Candidates shall not conduct surveys, polls, or vote-solicitation campaigns through their campaign platforms unless such tools are offered identically to all candidates by ADA.

g. Interactions on declared digital campaign platforms shall not count toward contact limits, but must remain public and viewable to all members of that platform.

h. Candidates may participate in interviews, podcasts, livestreams, forums, or digital communications hosted by independent platforms not affiliated with the ADA, including professional publications, podcasts, Facebook groups, or dental community pages. Participation in such media shall not require the consent of other candidates. A candidate's refusal to participate shall not prohibit others from accepting the same invitation. Prior to publication or broadcast, the host or moderator of any independent media appearance must send a written confirmation (such as an email) to the Office of the Executive Director, affirming that the opportunity to participate was extended to all declared candidates for the applicable race. All content must comply with the ADA Code of Ethics, including the principles of fairness and veracity.

15. The Election Commission shall not restrict participation in independent platforms, provided ADA rules and candidate ethics are upheld.

16. Candidates may use personal social media accounts for campaign-related posts, provided those posts follow all applicable campaign rules. Candidates are responsible for the content they post and are encouraged to monitor comments and tags that may violate ADA campaign policies. Campaign messages shared on personal pages should be publicly visible and accessible to all delegates.

### **Campaign Literature and Communications to Delegates and Alternate Delegates**

17. No printed campaign-related material may be distributed in the House of Delegates or to delegates and alternate delegates.

18. Candidates may prepare a piece of campaign literature to be electronically distributed to the delegates and alternate delegates following a candidate's announcement of candidacy for elective

1 officer. Such campaign literature shall be sized so that if printed the literature is no larger than four  
2 single-sided sheets of 8½ x 11 inch paper. If desired, a second piece of campaign literature or  
3 similar length may be electronically distributed to the delegates and alternate delegates following the  
4 candidates' receipt from the ADA of the final list of certified delegates and alternate delegates.

5 19. Each candidate may prepare a video to be distributed as described below to delegates and alternate  
6 delegates and other members of the House of Delegates.

7 20. Candidate brochures, videos or other campaign-related communications can include photographs  
8 and likenesses of the candidate but shall not include any photograph, likeness or mention of any  
9 other current officer of the ADA or current member of the ADA Board of Trustees.

10 21. Each candidate shall submit campaign literature and video to the ADA's election commission for  
11 review to ensure compliance with accessibility and formatting standards. The election commission  
12 may provide recommendations or flag concerns but will not require formal approval prior to  
13 distribution. The candidates shall obtain permissions to use the likeness or image of any non-familial  
14 third party that appears in a piece of campaign literature or in any video. Candidates shall state that  
15 such permissions have been obtained when submitting the literature and any video for review. The  
16 permission should be retained by the candidates and submitted to the ADA only if requested.

17 22. Each candidate is permitted to individually communicate with each delegate and alternate delegate  
18 three times via an electronic communication (i.e., email) for the purpose of campaigning,  
19 electioneering and soliciting votes following the receipt from the ADA of the list of certified delegate  
20 and alternate delegate contact information. A third party vendor may be used to send such  
21 electronic communications so long as the privacy of the email addresses and identities of the  
22 recipients are maintained and preserved and there is no ability to reply to all the recipients of the  
23 electronic communication. At each candidate's option, the candidate's electronic communication may  
24 contain the campaign literature and/or video referenced in these Campaign Rules, either by  
25 embedding or attaching the literature and/or the video to the electronic communication or by  
26 providing a hyperlink or hyperlinks that connect to the literature and/or the video that is stored in a  
27 remote location maintained by or on behalf of the candidate.

28 23. Each campaign is permitted to individually initiate a telephonic (phone call or text) communication  
29 with each delegate and alternate delegate three times for the purpose of campaigning,  
30 electioneering and soliciting votes following the receipt from the ADA of the list of certified delegate  
31 and alternate delegate contact information.

32 24. Nothing in these Campaign Rules shall prevent a candidate from communicating regarding matters  
33 within the specific duties of the candidate's position as an ADA officer, member of the Board of  
34 Trustees, task force or work group, as long as the communication is strictly related to such  
35 responsibilities and is not used for campaigning, electioneering or soliciting votes.

36 25. Candidates may each schedule up to three (3) telephone or video conferencing forums or town hall  
37 events during the campaign. A candidate desiring to hold up to three (3) telephone or video  
38 conferencing forums or town hall events shall communicate to the ADA the date of each event and  
39 the times at which each such event shall commence and end, together with the instructions and  
40 contact information necessary for participants to email and/or call with the questions they would like  
41 asked during the telephonic town hall. The ADA will announce the telephone or video conferencing  
42 town hall information to delegates and alternate delegates via ADA Connect and provide the  
43 information to the Election Commission members and staff. Candidates may also publicize the  
44 telephonic town halls they sponsor on any media.

26. The agenda for a candidate's telephonic town hall meeting(s) shall be the prerogative of the candidate, with the candidates being permitted to provide opening and closing statements and whether follow-up questions are permitted. The length of the telephonic town hall event is also discretionary with the candidate.
27. Candidates are expected to maintain a respectful tone during town halls and may use a moderator to manage questions and content. Offensive or defamatory comments are discouraged, but candidates shall not be held responsible for unscripted audience remarks beyond their control.

### **Contributions**

28. Contributions (including money and in-kind services) may only be accepted from individual dentists, family members, and ADA constituent or component dental societies (including study clubs and branches recognized by a constituent society). Contributions from any other source are not permissible. No candidate shall knowingly accept any contribution that creates the appearance of a conflict of interest as defined in the ADA Bylaws. Total contributions from any individual donor (including family members, friends, or colleagues) shall not exceed \$2,500 per election cycle. Total contributions from any ADA constituent or component society shall not exceed \$10,000 per candidate. All contributions over \$500, including self-funding and in-kind support, must be disclosed to the Election Commission within 10 business days of receipt. Because contributions from constituent and component societies may come from membership dues, all such support must be transparently reported and made accessible to ADA members through appropriate posting on ADA Connect and the candidate's campaign website, if applicable.
29. The sending of a brief note acknowledging a financial contribution or thanking a host of a campaign event to those contributors or hosts outside of the candidate's district is permitted, as long as no additional campaign message is included. Such thank you notes may be sent on campaign letterhead or a notecard containing the campaign logo; envelopes for the thank you note may contain an identification of the campaign or the campaign logo.
30. Any contribution source that could be interpreted to be a conflict of interest or creates the appearance of a conflict of interest must be reported to the Election Commission and the ADA Board of Trustees. In the event a contribution source is deemed to be a conflict of interest or creates the appearance of a conflict of interest, the candidates will be required to return the contribution.
31. Candidates for all ADA elective offices shall submit a monthly detailed report of all campaign contributions and expenses to the Election Commission by the 15<sup>th</sup> of the following month. The report shall include all contributions (regardless of amount), in-kind services, and expenditures. Campaigns shall also provide a summary of total funds raised and spent by the first of each month during the campaign period. These monthly summaries shall be posted by the Election Commission in the House of Delegates Library on **ADA Connect** for ADA member access.

### **Violations**

32. In the event a violation of the Campaign Rules is determined by the Election Commission to have occurred more than fourteen (14) days prior to the House of Delegates convening, then the Election Commission, if it cannot resolve the violation between the candidates, shall post a report of the violation in the House of Delegates section on ADA Connect. In addition, an email reporting on any such violations will be sent by the Election Commission to each certified delegates and alternate delegates with a working email address on file with the ADA on or about fourteen (14) days prior to the convening of the House of Delegates. Prior to public reporting of any violation, the Election



Commission shall notify the candidate in writing and allow a reasonable opportunity to respond. Any candidate named in a public violation report shall be given the opportunity to submit a written or oral response, which shall be made available to the House of Delegates alongside the original report.

33. In the event a violation of the Campaign Rules is determined by the Election Commission to have occurred in the period from fourteen (14) days prior to the convening of the House of Delegates through the elections of elective officers, then the Election Commission, if it cannot resolve the violation between the candidates, shall report those violations to the House of Delegates. The report will be given orally by the Election Commission chair (or a designee of the Election Commission if the chair is absent from the House of Delegates session) at the first meeting of the House. If violations occur after that meeting, and before the election, then a report of such violations shall be read to each caucus by a designee of the Election Commission. The candidate shall also be offered an opportunity to respond orally or in writing prior to or during the same session in which the violation is reported.

34. Should an allegation of a Campaign Rules violation against an individual or entity not affiliated with a campaign be made, the Election Commission shall review the allegation and determine if a violation has occurred. If so, the campaign and candidate affected by the infraction will be notified, and shall be responsible for contacting the individual or entity involved and using their best efforts to curtail the violation.

35. In addition to the foregoing notifications of violations, all violations of the Campaign Rules that occur shall be reported orally at the House of Delegates meeting by the Election Commission. The ADA encourages all delegates to review reported violations and candidate responses when casting votes, as ethical campaign conduct reflects integrity in leadership.

## Appendix C: Rationale and IRS Governance Alignment

The following list outlines key concerns with each rule addressed in the proposed amendments. While *IRS Publication 557 (January 2025)* does not speak to candidate campaign rules specifically, it outlines broad governance expectations for 501(c)(6) organizations, namely, that internal procedures must be equitable, inclusive, non-preferential, and avoid even the appearance of private benefit. Each rule below is summarized with the core problem and the governance concept it may conflict with. Citations to *Tax-Exempt Status for Your Organization (IRS Publication 557, January 2025)* are conceptual and not intended as legal interpretations.

### Disclaimer:

Although different types of 501(c) organizations serve varying purposes, all are expected by the IRS to follow core governance principles. As outlined in [Tax-Exempt Status for Your Organization \(IRS Publication 557, January 2025\)](#), these include avoiding inurement or private benefit, ensuring procedural fairness, and providing equitable access to participation. While the publication covers multiple types of exempt organizations, these principles apply broadly to 501(c)(6) membership associations like the ADA.

**Note:** While the 2024 Election Commission and Campaign Rules contained 37 distinct rules, the revised 2025 Campaign Rules 3.1 document consolidates several provisions and restructures numbering for clarity. **Two rules from the original set were merged into others without removing their substantive content.** For consistency and transparency, this Appendix preserves the original 37-rule format to provide a direct comparison and full rationale.

**Rule 1** – Updated to apply to all elective offices rather than only President-elect, Second Vice President, and Speaker.

– Ensures equitable treatment across candidates and avoids preferential governance.

**Rule 2** – Clarified direct communication procedures with the Election Commission and simplified response timelines.

– Supports transparency and administrative efficiency.

**Rule 3** – Reaffirmed annual distribution and acknowledgment of campaign rules by all officers.

– Reinforces procedural fairness and institutional awareness.

**Rule 4** – Ensures public posting of campaign rules summary for delegates.

– Increases transparency and broad access to governance procedures.

**Rule 5** – Refines how candidate agreements are treated, emphasizing transparency and neutrality.

– Prevents private deals from undermining fair process.

- 1 **Rule 6** – Removed geographic restrictions based on declaration timing. All candidates can now  
2 campaign nationally once declared.  
3 – Prevents insider advantage and ensures equal access.
- 4 **Rule 7** – No substantive change.  
5 – Retained for consistency with constitutional rules governing office declarations.
- 6 **Rule 8** – Rewritten to allow candidates to attend events individually if others decline.  
7 – Eliminates single-candidate veto and promotes free member engagement.
- 8 **Rule 9** – Expanded to permit virtual campaigning for Treasurer and Speaker beyond Annual  
9 Session.  
10 – Improves equity and flexibility in participation.
- 11 **Rule 10** – No substantive change.  
12 – Retained to encourage meaningful candidate evaluation by members.
- 13 **Rule 11** – Clarified prohibition on campaigning during personal travel while allowing  
14 transparency.  
15 – Upholds fairness and avoids hidden advantages.
- 16 **Rule 12** – Maintains event restrictions while clarifying exceptions for virtual participation.  
17 – Encourages fiscal responsibility and limits undue influence.
- 18 **Rule 13** – Expanded to include equal access requirements for journal articles.  
19 – Strengthens fairness and limits media bias.
- 20 **Rule 14** – Allows limited advocacy by groups with equal access to all candidates.  
21 – Balances free association with neutrality obligations.
- 22 **Rule 15** – Permits appearances in publications on professional topics if not used for campaign  
23 messaging.  
24 – Encourages thought leadership while preventing campaign misuse.
- 25 **Rule 16** – Permits broader digital communication beyond closed Facebook groups.  
26 – Modernizes outreach and reduces cost barriers.
- 27 **Rule 17** – Repealed. Independent platforms allowed with notice and equal access.  
28 – Aligns with modern communication norms.
- 29 **Rule 18** – Allows campaign use of personal accounts under rules.  
30 – Promotes accessible self-expression while maintaining standards.

- 1 **Rule 19** – Now allows electronic literature and video messages, with increased limits and  
2 frequency.  
3 – Enhances candidate communication and member education.
- 4 **Rule 20** – No change.  
5 – Retained to preserve access to concise candidate literature.
- 6 **Rule 21** – No change.  
7 – Retained for equitable visual messaging.
- 8 **Rule 22** – No change.  
9 – Maintains neutral use of officer imagery in campaigns.
- 10 **Rule 23** – Shifts from mandatory ADA approval to ADA review with advisory role.  
11 – Respects candidate autonomy while preserving consistency.
- 12 **Rule 24** – Increased from one to three emails allowed per campaign.  
13 – Expands digital engagement and ensures outreach fairness.
- 14 **Rule 25** – Expanded to three phone/text contacts per candidate.  
15 – Balances member access with privacy protections.
- 16 **Rule 26** – Clarifies permissible official duties and prohibits implicit campaigning.  
17 – Avoids misuse of position for electoral gain.
- 18 **Rule 27** – Codifies right to hold three town halls and outlines ADA posting role.  
19 – Encourages public engagement and procedural consistency.
- 20 **Rule 28** – Clarifies candidate control over town hall content and use of moderators.  
21 – Respects candidate discretion and structure.
- 22 **Rule 29** – Encourages respectful conduct without strict liability for third-party speech.  
23 – Upholds tone while avoiding punitive enforcement.
- 24 **Rule 30** – Adds caps and donor types, improves transparency, and prohibits outside influence.  
25 – Addresses private benefit and conflict risks.
- 26 **Rule 31** – No change.  
27 – Retained to permit donor recognition within boundaries.
- 28 **Rule 32** – Clarified duty to report questionable donors and return conflicts.  
29 – Ensures integrity of funding sources.

**Rule 33** – Strengthened by requiring monthly financial reports and full itemization.

– Improves oversight and public confidence.

**Rule 34** – Adds timeline for violation notice and candidate response.

– Improves due process and fairness in enforcement.

**Rule 35** – Provides candidate opportunity to respond to violation reports in caucus.

– Ensures equal voice and rebuttal rights.

**Rule 36** – Clarifies campaign duty to address violations by unaffiliated actors.

– Protects process from indirect interference.

**Rule 37** – Adds ethics-based reporting expectations to reinforce culture of accountability.

– Encourages responsible delegate decision-making.

**Appendix D - Comprehensive Comparison:****2024 Rules vs. Proposed Modernized Rules**

The 2024 campaign rules were a step toward improving fairness, but they preserved several outdated structures that unintentionally limit access, favor insiders, and expose the ADA to reputational and legal risk. The proposed Version modernizes the entire campaign framework to align with nonprofit governance principles, including procedural fairness, transparency, and equal access as outlined by the IRS in Publication 557. These changes do not favor any candidate or ideology. They ensure that *any qualified member*, regardless of timing, wealth, or insider status, can run for office in a process that is consistent, equitable, and ethical. It also promotes fiscal responsibility, supports digital engagement, and protects the ADA's standing as a tax-exempt professional association committed to integrity and inclusion.

Rule/Topic	2024 Campaign Rules	Proposed Modernized Rules	Change Summary
<b>1. Campaign Start (Rule 6)</b>	Only candidates who announce on the last day of the Annual Session may campaign nationally. Others are restricted to their own trustee district.	Any candidate may declare their candidacy in writing at any time and begin campaigning across the country.	Removes insider privilege. Opens the field to all candidates, regardless of timing.
<b>2. Veto Power Over Appearances (Rule 8)</b>	Candidates must agree unanimously to attend joint events. A single candidate can block everyone else from attending by refusing.	No single candidate can block others. Each candidate may attend, submit a video, or participate virtually regardless of others' choices.	Ends structural silencing. Promotes free speech and equal access to delegates.
<b>3. Digital Campaigning &amp; Social Media (Rules 16-18)</b>	Only a closed Facebook group is allowed. No other digital tools, no personal social media, no podcasts or livestreams.	Allows podcasts, livestreams, personal accounts, digital forums, and independent media, as long as content is ethical and access is fair.	Modernizes outreach. Removes outdated bans. Promotes inclusion and cost-effective messaging.
<b>4. Independent Media Engagement</b>	Participation in national or non-peer reviewed publications is	Allowed if the host offers equal access to all	Creates opportunity while ensuring

Rule/Topic	2024 Campaign Rules	Proposed Modernized Rules	Change Summary
	discouraged or prohibited.	candidates and confirms this in writing.	fairness. Avoids favoritism.
<b>5. Personal Social Media Use</b>	Candidates must monitor and remove any campaign-related posts or third-party tags on personal pages.	Candidates may use personal social media for campaign posts, provided content is accessible and ethical. Monitoring for abuse still required.	Removes unnecessary restrictions while keeping the process respectful and fair.
<b>6. Digital Platform Expansion</b>	Only closed Facebook groups for delegates allowed, moderated under strict ADA policies.	Any ADA-compliant digital platform may be used. Campaigns must designate moderators and follow ADA Code of Ethics.	Increases flexibility. Encourages innovation. Maintains integrity through clear responsibility.
<b>7. Equal Access for Literature/Video</b>	ADA must formally review and approve any campaign materials before distribution.	ADA may flag issues or suggest edits but cannot block distribution unless there's an ethics violation.	Shifts from censorship to transparency. Keeps campaign content candidate-driven.
<b>8. Email/Text Contact Limits</b>	One campaign email and one call/text per delegate allowed.	Three emails and three phone/text contacts per candidate are allowed.	Strengthens communication while preserving limits to avoid spam.
<b>9. Unannounced Candidates</b>	Rules apply only to officially declared candidates.	Rules also apply to individuals engaged in campaign activity (planning, fundraising, etc.) even if they haven't declared.	Closes ethical loophole. Ensures fairness across the board.
<b>10. Campaign Agreements Between Candidates</b>	Private agreements are allowed but not monitored.	Such agreements are non-binding if they restrict access, reduce fairness, or silence others.	Prevents private backroom deals from undermining public fairness.
<b>11. Appearance Invitations (Rule 8)</b>	All invitations must go through ADA staff, and campaigns must coordinate attendance by vote.	Invitations can go directly to candidates; coordination is encouraged but not required.	Removes gatekeeping. Allows candidates more flexibility to speak with constituents.

Rule/Topic	2024 Campaign Rules	Proposed Modernized Rules	Change Summary
<b>12. Town Hall Forums</b>	Three virtual town halls are allowed, subject to ADA control.	Still allows three, but format is more flexible. Pre-recorded participation allowed. Independent hosts permitted.	Expands access, supports lower-cost campaigning, and encourages diverse formats.
<b>13. Contributions – Sources and Caps</b>	No formal caps. No required disclosures except for conflicts of interest.	\$2,500 limit per donor; \$10,000 per ADA society. All contributions over \$500 must be disclosed within 10 days.	Prevents excessive spending. Creates level playing field and transparency.
<b>14. Financial Reporting</b>	Summary report required at end of campaign.	Monthly detailed financial reports required, including in-kind donations.	Promotes fiscal accountability and fairness. Discourages hidden money.
<b>15. Violations and Due Process</b>	Election Commission may report violations; candidates may have limited ability to respond.	Commission must notify candidate first. Candidate has right to respond in writing or orally before the House.	Adds basic due process protections. Promotes fairness and credibility.

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