

# ITI Study Clubs: Guidelines, Questions and Answers.

This document outlines the objectives, structure and organization of ITI Study Clubs.

This document is for ITI internal use only.  
It is effective as of May 2017 and replaces any previous versions.

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### Abbreviations

ITI HQ: ITI Headquarters  
 RoW: Rest of World  
 SC: Study Club  
 SCC: Study Club Coordinator  
 SCD: Study Club Director  
 STMN: Straumann

## I. GUIDELINES

### i. Objectives of ITI Study Clubs

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- a. Provide an effective method to **disseminate knowledge** in implant dentistry
  - Rapid top-down distribution of new educational information either on scientific findings, treatment concepts or latest developments from the ITI's industrial partner Straumann
  - Contribution to quality control in implant therapy
- b. Promote **interactive discussions** among Study Club members
  - Atmosphere of trust in small groups
  - Promote discussion and debate in a relaxed and informal environment
  - Enable Study Club members to be active by presenting and discussing their own cases
- c. Improve **membership value** for ITI Members and Fellows
  - Keep SC members up to date with the latest developments and findings in implant dentistry
  - CE credits for Study Club events where possible
  - Give SC members a sense of belonging to the ITI community
- d. Increase the **reputation** of the ITI
  - ITI Study Clubs must be run by the ITI, i.e. ITI Fellows or Members
  - Study Clubs will adhere to the ITI's objectives, philosophy and Articles of the ITI as well as its spirit, and respect its choice of global partnerships

### ii. Structure of ITI Study Clubs

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- a. **The Study Club Director**
  - is an ITI Fellow or ITI Member
  - runs the SC alone or together with one Study Club Co-Director
  - is in charge of running the ITI Study Club, puts together the program for each SC event and books outside speakers
  - handles the finances of the SC, maintains clear accounting practices and keeps the receipts for Study Club expenses from the previous and current year
  - manages the ITI Study Club on the ITInet; fills out an event report (activity and expense reporting) and submits it to ITI HQ on the ITInet after each event
  - keeps a participant list for each Study Club event
  - meets annually at the Section's SCDs meeting with the Section's SCC to discuss relevant topics (does not apply to SC Directors from RoW countries). For these meetings, ITI provides travel support and accommodation out of the Section budget in accordance with the ITI's financial guidelines
  - The term of office of a SCD is open ended
  - The term of office of a SCD can be terminated by the SCC in consultation with the Section Manager if the SC Director does not fulfill the objectives or breaches the ITI's Study Club guidelines
- b. **The Study Club Coordinator**
  - is an ITI Fellow
  - is the link between ITI HQ and SCDs in the Section
  - is part of the Section Leadership Team and is similarly compensated (depending on the Section's membership numbers)
  - encourages SCDs to manage their SCs via the ITInet

- checks the Section's SCDs ITInet-based event reports and asks the SCDs for adjustments/ completion if necessary
- makes sure all Study Club event reports are submitted on the ITInet by the end of the calendar year based on the ITInet-generated Study Club detail report on the activities of all SCs in the Section
- is elected by the Section's general assembly of Fellows for a 4-year period and may be elected for one more 4-year term of office
- can run his/her own Study Club
- In ITI Sections without a SCC, the Education Delegate takes on the responsibilities of the SCC
- In countries without an ITI Section, ITI Headquarters (ITI HQ) takes over the responsibilities of a SCC; contact: [studyclubs@iti.org](mailto:studyclubs@iti.org)

**b.i. Coordinates and supports the various Study Clubs (SC) in the Section**

The SCC has an overview of all the SCs, when they meet, who runs each SC, and how many members there are in each SC. The SCC supports the SCD in ensuring non-ITI Members join the ITI by their third SC visit. The SCC has an overview of the geographic distribution of the SCs within the Section so that they can coordinate the number of meetings and their location optimally.

**b.ii. Organizes and hosts one meeting with the SCDs at Section level each year**

In consultation with the Section Leadership Team, the SCC invites all the SCDs to a meeting once a year. It is recommended that this meeting takes place in conjunction with the Section's annual Fellow meeting or Section meeting. The entire Section Leadership Team should also be present. During the meeting, the SCDs report on their club and exchange experiences. The meeting also serves to inform the SCC about the activities of each SC. Questions and issues are also discussed at this meeting. The ITI provides travel and accommodation support for this meeting in line with the ITI financial guidelines. The costs must be budgeted within the annual Section budget.

**b.iii. Establishes close cooperation with the Section Manager**

The SCC and the Section Manager are responsible for overseeing Study Club activities and monitoring Study Clubs to see that they comply with Study Club guidelines. The Section Manager actively supports the Study Club Coordinator in establishing new Study Clubs and finding qualified Study Club Directors.

**b.iv. Encourages ITI Fellows and ITI Members to establish a SC**

The SCC must approve a new SC in consultation with the Section Manager before the application can be sent to ITI HQ. The SCC needs to be kept up to date by all the SCDs. He/she encourages individuals who would like to run a SC to apply if they are thought to be appropriately qualified.

**b.v. Is invited by ITI Headquarters to participate in a SCC meeting in conjunction with the ITI's Annual General Meeting**

The SCC is invited by ITI Headquarters to participate in the ITI's annual SCC meeting. The SCC meeting takes place once a year before the ITI Annual General Meeting. Costs for travel and accommodation are covered by the ITI for SCCs from Sections whose membership is higher than 250. The SCC meeting serves as a forum for discussion and information exchange on ITI Study Clubs.

**b.vi. Is the point of contact for all SCDs and supports them as required**

SCCs are the point of contact for all information regarding SC activities within the Section. The SCC provides specific support to the SCDs as needed and forwards information from ITI HQ.

**b.vii. Can terminate the term of office of a SCD**

If a SCD does not fulfill the objectives or does not comply with the guidelines and regulations described in this document, or is not active in his/her role as a SCD, the SCC, in consultation with the Section Manager, may terminate the SCD's term of office.

**b.viii. Ensures SCs are included in the annual Study Club budget**

ITI HQ kicks off the ITInet-based Study Club budgeting process in the 3<sup>rd</sup> quarter each year. The SCC informs ITI HQ through ITInet-based reporting if any Study Clubs are to be merged or closed and how many events (3 or 4) each Study Club in the Section will hold for the upcoming calendar year by the given deadline. The Section Leadership Team should be kept informed, but does not play an active role in putting together the SC budget.

**b.ix. Forming new ITI Study Clubs: What the SCC needs to provide**

The SCC provides the current version of the "ITI Study Club Application Form" form to every doctor interested in starting an ITI SC (current version available for download via the ITInet at Tools&Guidelines/ Guidelines/Study Clubs) and emails the completed and signed document to ITI HQ ([studyclubs@iti.org](mailto:studyclubs@iti.org)), copying the Section Manager. The SCC ensures that the names of all SCs in the Section are unique (also see questions 9 and 10). By signing the application form, the applying doctor(s) agree(s) to abide by the ITI Study Club guidelines and the regulations described in this document. ITI HQ informs the SCC, the Section Manager and applying doctor of the decision as soon as possible. Establishing new SCs on the ITInet and putting the SCDs online on the ITInet is done by ITI HQ.

**b.x. Disseminates the educational content provided by the ITI Education Committee**

Educational content in the form of two PowerPoint/Keynote presentations annually will be produced in English via the ITI Education Committee and disseminated to the SCDs via the SCCs. The topics determined by the ITI Education Committee must be included in the program of 2 events of each Study Club per year. SCDs can cover these two topics any way they want and for any length of time they choose.

**iii. Organization**

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- **ITI Study Clubs are administered by one Study Club Director or two Co-Directors**
  - The recommended maximum number of registered ITI Study Club members per Study Club is 30
  - Members of SCs must be ITI Members or Fellows
  - Non-ITI-Members can attend twice as guests in order to encourage them to become ITI Members; guests must then sign up for ITI membership after the second meeting if they want to continue attending ITI Study Club events
  - SC Directors must allocate the members of their SC to their SC on the ITInet
  - SC Directors must make a list of attendees at each meeting indicating members and guests
  - An ITI Member can be listed as a permanent member of one SC only
  
- **ITI Study Clubs offer a Study Club Program with evening events**
  - SCs offer a minimum of 3 events per year
  - SC Directors should ideally hold 4 meetings per year, i.e. one per quarter
  - Speakers can be invited to up to 2 events per year, with an external international speaker at only one of the 2 events
  - The ITI's Education Committee decides on two topics to be covered each year and provides

educational content for these topics in the form of presentations. These topics must be included in the program of 2 events during the Study Club year. SCDs are free to cover the topics as they wish, using whichever materials they wish including the presentations provided

- Study Club topics may comprise treatment planning sessions, case presentations, laboratory material and techniques, practice management and practice building sessions
- Product information can be provided, but only from the ITI's official industrial partner Straumann
- Representatives or employees of commercial entities, other than the ITI's official industry partner STMN, are not permitted to lecture at ITI Study Clubs
- CE accreditation by local authorities as a goal
  - This will be achieved by the SC Coordinator together with the Section Leadership Team in each Section in line with local requirements
  - In RoW countries the SC Director is responsible for achieving CE accreditation for his/her SC where applicable and in cooperation with the local Straumann distributor/representative and in consultation with ITI HQ in Basel where necessary

- **ITI Study Clubs receive direct financial support from the ITI**

- For a Study Club to be established and funded, the SCC, after consultation with the Section Manager, must officially apply to ITI Headquarters using the "ITI Study Club Application Form" that is completed and signed by the applying doctor(s). The applying doctor(s), the SCC and the Section Manager will all be informed by ITI HQ as soon as a decision has been made
- Funding is provided to the SC Director in the form of an ITI credit card
  - The SC Director will be fully accountable to the ITI for the charges made to the credit card
  - The SCD will maintain clear accounting practices for the operation of the ITI Study Club and these will be available for review if requested by the SCC or ITI HQ
  - All receipts are to be kept for the current and past year
  - The funds provided must only be used as outlined in this document
  - Any remaining funding for the year will not be carried over to the following year
- Preliminary funding will be set each year on August 31 for the calendar year to come based on the number of members assigned to the Study Club on the ITInet on that day and the number of budgeted events for the year to come. Maximum funding is based on 4 events
- ITI Headquarters will adjust the annual Study Club budgets on April 30 each year in line with the final Study Club membership figures on the ITInet on that day so that each Study Club Director has a budget based on the actual number of members. SCs that fall below the minimum number of 5 SC members (including the SCD) will be closed
- The Study Club budget for the first year of activity is outlined in the confirmation letter sent to the SCD after the new SC has been approved and on the budget overview on the ITInet
- Please note that the annual budget is directly linked to the total number of events budgeted for that calendar year. If fewer events are held than budgeted, the annual budget will automatically be reduced by the number of events budgeted but not held. For example: annual budget for 4 events is CHF 4,000, if only 3 events are held, the annual budget is reduced to CHF 3,000
- Maximum funding will be paid as of 25 Study Club members.
- SCDs manage their SC via the ITInet by publishing all Study Club events and filling out and submitting an event report (financial and activity reporting) after each SC event on the ITInet
- Information on funding can be obtained from ITI HQ ([studyclubs@iti.org](mailto:studyclubs@iti.org))

- **Authorized use of SC financial support**

Please note that there are defined limitations on how the financial support provided by the ITI may be used. These are outlined in the items below.

- Rental of premises: a meeting room in a hotel or another appropriate location. Should the SC take place in the SCD's practice, for example, no fee can be charged.
- AV equipment, i.e. projector, can either be rented when needed or purchased out of the Study Club budget once only. Purchased equipment belongs to the ITI, i.e. if a Study Club Director resigns, the equipment is to be handed over to the Director's successor. If a Study Club is closed, the equipment must be shipped to ITI HQ in Basel. The following must not be purchased out of the Study Club budget: computers, video cameras, photo cameras and similar. AV equipment is rented or purchased once for a maximum of CHF 1,000, EUR 800, USD 900, depending on the Study Club's budget currency
- Snacks, light meals and soft drinks: snacks or finger food should be made available to the participants, as well as water and soft drinks. SC funding is not intended for full meals or alcoholic drinks
- SCs can charge their members an additional fee for cost over-runs as required if all the SC members agree
- Travel expenses and honoraria for outside speakers are negotiated directly by the SCD with the speakers, and funded within the SCs allocated budget
- Up to 15%, of the annual SC budget can be used to cover administrative costs incurred by the SC Director
- SC Directors and members cannot receive honoraria for speaking at their own SC
- As a general rule, non-ITI Members can attend twice and must then sign up for ITI membership if they want to continue attending the SC or another ITI SC
- SC funds must not be spent on materials for hands-on workshops, i.e. neither the ITI nor the Study Club Director(s) may buy materials/products from Straumann or other manufacturers for use at ITI Study Club meetings; if a SC would like to combine a SC meeting with a hands-on workshop, this can be done exclusively with the ITI's industrial partner Straumann and only if STMN is willing to provide the products, models, equipment, etc. needed

- **The role of Straumann**

- It is important that close collaboration is established between the SC Coordinator and the Section Manager
- STMN representatives support SCs in the acquisition of new members
- STMN representatives can advise the Section Leadership Team about the need or interest to establish new SCs
- STMN representatives are invited to attend the Study Club meetings as guests and must be assigned to the SC on the ITInet

## II. QUESTIONS AND ANSWERS

### i. General responsibilities of an ITI Study Club Director

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**1. What must an ITI Member/Fellow do if (s)he would like to form a Study Club?**

An ITI Member/Fellow who is interested in forming an ITI Study Club contacts the Section's SCC or ITI HQ ([studyclubs@iti.org](mailto:studyclubs@iti.org)) for more information on how to proceed. To start the application process to establish a new SC, the "ITI Study Club Application Form" needs to be filled out and the signed document sent to ITI HQ by the SCC, copying the Section Manager.

**2. Does a new SCD of an existing SC need to sign any documents?**

Any change of a SCD for an existing ITI SC requires a signed "Study Club Director Statement" that is supplied by the SCC. By signing this statement, the new SCD(s) agree(s) to abide by the ITI Study Club guidelines outlined in this document. A copy of each signed statement must be provided to ITI HQ ([studyclubs@iti.org](mailto:studyclubs@iti.org)) by the SCC.

**3. Does the SCD provide continuing education credits to the Study Club participants?**

Based on local regulations, the SCD, in cooperation with the SCC and the support of the Section Manager, should take all the necessary steps to provide participants with CE credits.

**4. Can a SCD run two or more ITI SCs?**

No, this is not possible. A SCD can only run one ITI SC.

**5. How many SC meetings does the SCD hold annually?**

The SCD organizes and conducts either 3 or 4 SC meetings per year according to the number of events budgeted on the ITInet. Ideally, one event is to be organized and held every quarter/four months by each Study Club. Additional meetings can be held, but need to be funded out of the originally approved budget. If fewer than the number of budgeted events are held, the SC budget reduces accordingly (e.g. 4 SC meetings budgeted at an annual SC budget of CHF 4,000 for 4 events. If only three SC events are held the annual SC budget reduces to CHF 3,000).

**6. What information must the SCD provide to ITI Headquarters and how?**

The SCD is obliged to manage his/her SC on the ITInet. SC management on the ITInet comprises the following tasks:

- a) Keeping the master details of the SC up to date
- b) Assigning all SC members to the SC on the ITInet
- c) Creating events for the SC on the ITInet
- d) Keeping a participant list for each Study Club event and, if wanted, uploading it to the ITInet
- e) Filling out and submitting the event report (SC expense and activity reporting) after each SC event on the ITInet

### ii. Starting a new ITI Study Club

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**7. What is the minimum number of members required to apply for a new ITI SC?**

The minimum number of members listed on the application to form a new ITI SC is five including the future SCD(s). The applying future SCD(s) must hold ITI membership status at the time of application.



**8. What must a doctor interested in starting an ITI SC do to get a new SC approved?**

The doctor needs to discuss their wish to start an ITI SC with the SCC in their Section, send the completed and signed "ITI Study Club Application Form" received from the SCC back to the SCC, who then passes it on to ITI HQ ([studyclubs@iti.org](mailto:studyclubs@iti.org)). The applying doctor(s), Section SCC and the Section Manager will then be informed of the decision by ITI HQ as soon as possible.

**9. Is there a naming system in place for Study Clubs?**

Naming should be based on locality: city and region/area/suburb (e.g. New York City 3/Berne 4/Barcelona West). The name of each SC must be unique. The SC must not be named after the SCD or the SCD's practice.

**10. Who arbitrates if there happen to be two SCs in the same area wanting to use the same name?**

The SCC must ensure the names of all SCs in the Section are unique. The SCC arbitrates where necessary.

**11. Can a new Study Club be started during the year, even if not budgeted for, or is the doctor interested in starting an ITI SC to wait until the next year?**

SCs can start during the year as soon as their application is approved.

**12. Can a Dental Technician be a SCD?**

Yes, a dental technician can run an ITI Study Club as SCD.

**iii. Converting existing Study Groups/Study Clubs into ITI Study Clubs**

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**13. Can an existing study club/study group be converted into an ITI SC?**

It is possible to convert clubs into ITI Study Clubs. To do so the SCC is to be contacted and an application sent to ITI HQ.

**14. Do the members of an existing study group need to become ITI Members?**

Yes, all members who want to remain in the SC need to sign up for ITI membership as soon as the ITI Study Club is approved.

**15. Do existing study groups/study clubs need to provide documentation for expected activities and expenses?**

As soon as the club has been converted to an ITI Study Club (i.e. as soon as the application has been approved), the SCD needs to report on the SCs activities via the ITInet by publishing events and submitting an event report after each meeting. Also see question 6.

**16. Can an ITI Study Club Director run another Study Club, e.g. a Seattle Study Club?**

Yes. As long as both clubs are kept strictly separate.

**iv. Study Club Members**

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**17. Can one be a member of two or more ITI SCs?**

No, this is not possible. An ITI Member can attend any ITI SC meeting worldwide as a guest upon notifying the SCD, but cannot be a permanent member of more than one ITI SC.

**18. What is the difference between a SC member and a SC guest?**

A SC member belongs to a specific SC, is an ITI Fellow or ITI Member and attends the meetings of this SC on a regular basis. A SC guest may attend the meetings of any SC either locally or internationally after having contacted the SCD. SC guests who are not yet ITI Members may attend two ITI SC events before they are required to take out ITI membership.

**v. Fees for Study Clubs**

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**19. If a SC that used to charge a membership fee converted into an ITI Study Club, can they continue to charge a membership fee (i.e. a SC participation fee)?**

No, fees cannot be charged. An ITI Member is entitled to attend any ITI SC worldwide free of charge. SCs can levy a fee to non-SC members attending the meeting equal to the amount of the expenses for the attendee.

**20. Can SCs levy an additional fee for budget overruns, if required?**

If all the SC members agree, a charge can be made as required. SCs may hold a combined meeting should a renowned national or international speaker be invited to lecture who is of interest to other SCs. The SC budgets may be combined to cover any additional costs that may arise. Alternatively, the SCD can levy an additional fee from the participants for a speaker if all the SC members agree.

**vi. Financial Support from the ITI**

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**21. How is financial support provided?**

Financial support is provided in the form of an ITI credit card that is to be used to cover all the costs in connection with the organization and running of the ITI Study Club in line with the authorized use of ITI SC financial support as outlined in this document.

**22. When is financial support provided and how much?**

The SC budget for newly approved SCs is released and published on the ITInet once all the members listed on the application form are assigned to the Study Club on the ITInet. This is also when the SCD receives the ITI Study Club credit card. The SC budget for the first year of activity is communicated in the confirmation letter sent by ITI HQ after the SC has been approved. Established SCs find their annual SC budget on the ITInet under Study Club/Administration/Budget.

**23. Is there a minimum number of SC members in order to receive financial support?**

Yes, the minimum number of SC members (including the SCD) to be eligible to receive financial support from the ITI is 5. If a SC falls below that number, the SC will be closed.

**24. Accountability of the SCD**

The SCD will maintain clear accounting practices for the operation of the ITI Study Club and make these available for review if requested by the SCC or ITI HQ. This includes keeping the receipts of SC expenses from the past and current year and completing and submitting an event report after each SC event. Also, see question 6.

## **vii. How to use the financial support of an ITI Study Club**

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### **25. Can SC funds be used for advertising?**

The SC guidelines do not support funding for advertising however if SCDs feel it is crucial to the success of their SC, the resulting costs must be covered out of the 15% in their budget that is designated for administrative costs.

### **26. Can SC funds be used to compensate the SCD or members of the SC?**

No, the SCD and SC members cannot receive compensation or honoraria for activities within their own Study Club and/or in connection with the organization of the SC meetings. Study Club Directors cannot pay themselves or members of their Study Club a speaker fee for lecturing at their own Study Club.

### **27. Can SC funds be used to pay ITI membership dues?**

No, this is not possible.

### **28. Are there fixed speaker fees for an ITI SC?**

No, the speaker fee is to be negotiated between the SCD and the potential speaker. The fee should stay within reasonable limits.

### **29. Can international speakers from abroad be invited?**

Yes, but to only one Study Club meeting per year.

### **30. Can commercial entities support ITI Study Clubs financially?**

No, it is not possible for any commercial entity to support ITI Study Club activities financially, i.e. no money, products, speaker support or exhibitions provided by commercial entities are allowed. The exception to this rule is the ITI's industrial partner who may provide products for hands-on workshops if they would like to do so. Similarly, representatives and employees as well as individuals with an active involvement in a commercial entity (other than the ITI's official industry partner STMN) are not allowed to lecture at ITI Study Clubs.

### **31. Can money be spent in January to cover the costs of a meeting held at the end of the previous year and still be allocated to the previous year's budget?**

No, all expenses between January 1 and December 31 of a calendar year are allocated to the spending/budget of that same year. The reason for this is that both budgeting of Study Club funds and credit card accounting apply to the same calendar year. Costs incurred during a calendar year must be covered by December 31 of that year. Where this does not happen, the costs will be deducted from the following year's SC budget.

## **viii. Support from the ITI and its Education Committee**

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### **32. Does the ITI provide educational content to the SCDs?**

The ITI Education Committee defines at least two topics per year on which educational content in English (two presentations annually) is produced by the Committee and disseminated to the SCDs via the SCCs. These topics must be included in the program of two events of each Study Club each year. These topics can be covered in any way and for any length of time.

### **33. Do SCDs and SCCs have access to the "Speaker Tools" area on the ITInet?**

Yes, all SCDs and SCCs have access to the "Speaker Tools" area on the ITInet.

**34. How can ITI SCs make use of the ITI Online Academy content?**

- a. All SCDs have full free access to the ITI Online Academy (ITI OA). This viewing access can be used to show content from the ITI OA at any SC event or be used for the preparation of a SC event.
- b. SCDs have the possibility to unlock content (learning items) on the ITI OA for their SC members at a 50% discount. Unlocks are made by the SCD on the ITInet on their Study Club page under the “Resources” tab through “Manage Resources”. The unlocked ITI OA learning items will be permanently available to every member of the Study Club under “My Academy” on the Online Academy.

**35. How much do ITI Online Academy unlocks cost?**

The costs are calculated by multiplying the Academy Credits associated with the learning item by the number of SC members assigned to the SC on the ITInet (an Academy Credit equals CHF 1, EUR 1 or USD 1, depending on the Study Club’s budget currency). This amount is then to be divided by 2 as SCDs can unlock content at a 50% discount. The total cost associated with unlocking the learning items will be displayed before being deducted directly from the Study Club budget. The Study Club credit card is not needed.

**ix. The role of Straumann**

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**36. How does Straumann support the SCDs and SCCs?**

The SCC works closely with the Section Manager. Straumann representatives support SCs in the acquisition of new members. They can advise the Section Leadership Team about the need or interest to establish new SCs. Straumann sales representatives are encouraged by the SCC and Section Manager to promote the ITI SC concept.

**37. Can Straumann representatives participate in ITI Study Clubs?**

STMN representatives are invited to participate as guests.