**501(c)(3) Nonprofit Organization**

9/10/2024

1. **Name**
   1. Excellence in Oral and Maxillofacial Surgery Foundation
   2. Foundation for Excellence in Oral and Maxillofacial Surgery ?
   3. Excellence in OMS Foundation
   4. Trademark:
      1. Excellence in OMS
      2. Excellence in Oral Surgery
      3. Excellence in OMS Foundation
      4. Excellence in Oral and Maxillofacial Surgery Foundation
      5. Logo
      6. Promoting excellence in OMS
      7. Promoting excellence in OMS through education
      8. Goods and Services:
         1. Class:
            1. IC 041: Education and training services namely, classes, seminars, mentoring, and training in the fields of Oral and Maxillofacial Surgery and Dentistry; Arranging for the attendance of various conferences, scientific meetings, seminars, and training courses or classes through travel scholarships granted to Oral and Maxillofacial Surgeons, Oral and Maxillofacial Surgery Residents, and Dental Students who show interest in pursuing a career in Oral and Maxillofacial Surgery.
            2. IC 044: Charitable services, namely organizing and providing Oral and Maxillofacial Surgery, Dentistry, and other oral health services to underserved populations.
            3. IC 016: Publications, namely, research reports, scientific articles, treatment guidelines, newsletters, books, brochures, manuals, online blogs or social media posts, and other printed or digital material in the fields of Oral and Maxillofacial Surgery and Dentistry,
      9. Owner: Excellence in Oral and Maxillofacial Surgery Foundation, non-profit corporation, MO, USA.
      10. “Creating surgical excellence” – trademarked by Pikos Institute
      11. FOR – Foundation for Oral Rehabilitation
2. **Organization Mission Statement**
   1. Clearly state specific charitable purposes, and state who will benefit.
   2. Our mission is to promote the achievement of excellence in the field of OMS by providing continuing medical education and training to OMS and OMS Residents to allow them to provide the best care to their patients.
   3. Our mission is to promote the achievement of excellence in the field of OMS by providing opportunities for (?) continuing medical education and training to OMS and OMS Residents to allow them to provide the best care to their patients.
   4. Our mission is to advance the field of OMS through education and clinical training by providing continuing medical education and training to OMS and OMS Residents to allow them to provide the best care to their patients.
   5. Our mission is to advance the field of Oral & Maxillofacial Surgery (OMS) through education and clinical training for Oral & Maxillofacial Surgeons and OMS Residents.
3. **~~Financial Statements and Budgets~~**
   1. ~~Most recent financial statement (if any)~~
   2. ~~Budget for next two years, summarizing the expected income and expenses~~
      1. ~~See below.~~
4. **Funding Sources**
   1. Current and expected sources of funding (grants, donations, fundraising events, etc.), and who the target donors will be.
   2. How will the organization execute its fundraising.
      1. Describe the types of fundraising events, if any.
      2. At this time, there will not be any fundraising events planned. Funding will be achieved via outreach to various organizations and individuals for donations.
   3. Funding
      1. Oral Surgery Partners (OSP)
      2. Private donors (individuals)
      3. Various other corporations
         1. Geistlich Pharma
         2. Snoasis Medical
         3. DentSply Sirona
         4. TRI Dental Implants
         5. ZimVie
         6. BioHorizons
         7. Nobel BioCare
         8. VaTech
5. **~~Compensation~~**
   1. ~~Salary information for officers, directors, and key employees, if any.~~
      1. ~~None currently.~~
6. **Description of Activities**
   1. Detailed description of all planned activities and programs of the nonprofit.
   2. Clinical Observership Program – STL
   3. Various courses and conferences
      1. AAOMS Annual Meeting
      2. AAOMS Dental Implant Conference
      3. ACOMS Annual Meeting
      4. Meisinger High Altitude Comprehensive Implant Symposium
      5. Spear Education courses and conferences/summits
      6. Others TBD
7. **Beneficiaries**
   1. Who will be benefitting from the organization’s activities (e.g., specific communities, demographics).
   2. Oral and Maxillofacial Surgeons and OMS Residents – directly
   3. Dental students who demonstrate interest and promise in pursuing a career in OMS – directly
   4. Underserved patients in the Greater St. Louis area (and potentially other geographical areas) that are in need of dental care – directly
   5. All future patients treated by OMS and OMS Residents who have benefited from the continuing education provided by the EOMSF
   6. OMS co-residents of those who have participated in the various courses/programs provided by the EOMSF through the dissemination of gained knowledge.
8. **Locations of Activities**
   1. List all locations where activities are or will be conducted, including activities outside of Missouri or the US.
   2. St. Louis, MO
   3. Chicago, IL – AAOMS Dental Implant Conference.
   4. Various cities throughout the US where conferences will be held.
   5. AAOMS Annual meeting – various cities throughout the US
   6. ACOMS Annual meeting – various cities throughout the US
9. **Political and Lobbying Activities**
   1. Will the organization engage in any lobbying or political activity of any type?
   2. No. The Foundation will be apolitical.
10. **Program Monitoring and Evaluation**
    1. Describe how the organization evaluates its programs and measures success.
    2. Board of Directors will meet regularly to review the various programs and their effectiveness and efficiency.
    3. Success will be gauged by use of surveys given to OMS/Residents who attend the various conference/events to judge the impact of each conference/event.
11. **Other States’ Operations or Registration**
    1. Indicate if the organization is or plans to operate or fundraise in other states
    2. Not at this time, but perhaps in future as foundation grows.
12. EIN number
    1. Register in MO
13. Bylaws
    1. Will need to draft bylaws. Get sample draft from Legal?
14. Strategic Partnerships
    1. Midwest OMS (St. Louis, MO).
    2. Dental Lifeline Network (nonprofit org)
    3. OsteoScience Foundation?
15. Timeline
16. Business Plan
17. Job Descriptions
18. Organizational Chart
    1. Executive Director – David Urbanek
    2. Board of Directors, including board chair.
19. Board of Directors
    1. David Urbanek, Chair
    2. Jon Copeland?
    3. Steve Nettler?
    4. Brian Redders?
20. Advisory Board
    1. TBD
21. Percentage paid to mission
    1. People may ask “How much of my money is going toward the mission?”
    2. Impact dollars??
22. Logo
23. Website

**Operating Budget**

Income

1. Donations from Oral Surgery Partners LLC (OSP), private individuals, and various medical and dental corporations

Expenses

1. Start-up costs
   1. Formation of organization
   2. Legal
   3. Accounting
   4. Logo
   5. Website
2. Accounting costs (ongoing)
3. Legal costs (ongoing, as needed)
4. Costs to apply for non-profit status
   1. Application fee?
   2. Legal and accounting help
5. Board meetings
   1. 2-4x/year
6. Travel Scholarships
   1. AAOMS Dental Implant Conference 2024 – 10 scholarships at $1,000 a piece
   2. AAOMS Annual Meeting 2025 – 10 scholarships
   3. ACOMS Annual Meeting 2025 – 10 scholarships
7. Travel and conference expenses for members/faculty of foundation
8. Advertising
9. Website creation and maintenance
10. Office supplies
11. Compensation for Executive Director and/or Board of Directors?
12. Salaries for key employees?

A diagram of a company organization chart

Description automatically generated