

**Report of the ADA Executive Director  
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Good morning, Mr. Speaker, Leaders, Friends, and Distinguished Guests.

I'm excited to meet in Orlando – a city where I am inspired by the power of possibility.

At SmileCon's opening session, I expressed my love for all things Disney and drew parallels between what Disney represents and the ADA's work. Although we are not in the entertainment business, the ADA—like Disney—shares the dream of uniting people and improving lives.

We also share a forward-looking ethos that empowers us to not only expect a great big, beautiful tomorrow... but empowers us to design what our tomorrow will be. That's the spirit of my favorite Disney attraction, The Carousel of Progress, which was introduced in 1964 to showcase technological transformation over the 20th century.

Here's how it works: Visitors sit in a revolving theater, moving around a circular stage depicting a family's life over a century. They engage with innovations like indoor plumbing, radios, and automatic dishwashers. The final scene showcases voice-activated appliances and virtual reality.

With the change of each scene, with the passage of time, the riders' seats move toward the scene of the future. Whether you like it or not, if you're on the Carousel of Progress, you're always moving forward into the next level of innovation –never backwards.

Near the end of the closing scene, there's this great line: "What will they think of next? Who knows? We've got a whole new century waiting for us out there."

The American Dental Association is on its very own carousel of progress, and as leaders, we are not only along for the ride, but we are the architects of the ADA's next scene—evolving with the changing times to make our Association the best it can be today with an eye toward tomorrow.

In dentistry, the scene of 2023 features a major generational divide, with large shares of dentists between the ages of 30 and 40 and dentists between the ages of 60 and 70. This is a departure from the year 2001, when most dentists were between the ages of 45 to 50.

The critical aspect is that 57 percent of our full-dues-paying members are in the late-career stage, while 43 percent of our full-dues-paying members are early-career professionals. A large cohort of late-career dentists will enter retirement in the next few years.

What lies before us is a strong opportunity to embrace the next generation of dentists at the local, state, and national levels and welcome them into ADA membership.

The ADA has taken to heart the famous adage: “If we want different results at our ADA, we have to do something different.” While our current membership numbers are holding steady, our market share continues to drop due in part to the larger number of recent graduates. Connecting with younger dentists will be essential to our growth, sustainability, and relevance in the years to come. This is especially true with more dentists graduating than ever before.

Last year, I shared the cautionary tale of Blockbuster Video, whose reluctance to adapt to a changing landscape led to its being obsolete. The same will not be said of your American Dental Association.

So, since I began my tenure of change just over 18 months ago, we’ve set forth on a journey toward reinvention. Through the perspectives, foresight, and collaboration of ADA leaders like you, we’re positioning our Association to thrive, with the following three key goals as our compass:

- One: Cultivating a seamless membership experience. Whether in-person or online, we’re delivering the products, services, and resources our members need... when, where, and how they need them.
- Two: Granting the ADA the agility to make decisions and act more quickly than ever before.
- And three: Fostering connections beyond the four walls of our ADA and across our profession... driving global opportunities to make people healthy by way of organized dentistry, dental education, and all dental professionals.

2023 marks an early chapter in the ADA’s evolution. Although we are very much in a period of transition, transformation is already happening before our eyes. Here are some highlights.

On an overarching level, the ADA has worked behind the scenes to achieve greater business efficiency by:

- Improving upon or eliminating antiquated systems

- Combining efficiencies where necessary and possible
- Realigning our workforce toward high-value, high impact, customer-focused initiatives
- Addressing redundant programs developed under divisional-based accounting
- Leveraging today's technologies to track and analyze membership needs and future trends

Our new agile, "goal based," operations will allow us to carry these efficiencies and expense-saving measures to our components and constituents. This all results in a projected 5.1 plus percent reduction in our member dues expenditures, which ultimately translates to cost savings for our members.

You'll remember that last year, we structured the ADA's workflows according to four primary customer groups — Public and Professional, Direct to Dentist, Direct to Tripartite, and Internal/Enterprise. We've since added the Business Innovation customer group to our portfolio.

One thing to remember: Our alignment by customer group is a process—but our focus is our profession. Our focus is our members.

All five groups are in motion now, so let's take a quick look at the progress of each of our customer groups.

The ADA's Direct to Dentist group continues to create a customized membership experience for dentists in every practice setting nationwide. Efforts include the development of high-impact programs and real-world experiences to support dentists along their career journeys, with a targeted focus on students and new dentists.

Additionally, the ADA's ongoing digital innovation goes hand-in-hand with bolstering the ADA's membership experience, helping us compete in a landscape where dentists are also consumers. Like all of us, they are used to being in control, getting what they need on demand and in a personalized format.

The reimagined ADA Member App is completing its first year of operation and still in the minimum viable product stage.

The MVP stage, as it is known, is a process by which we deliver value to the marketplace, but more importantly, allows us to receive immediate feedback from members. Such feedback enables us to make customer-focused improvements and releases.

The app launch was a major win for us in 2022, and it is continually enhanced to put relevant information and handy resources at the fingertips of our members —

specifically, at the fingertips of the more than 21,000 members who have downloaded the app in less than one year.

Our multi-channel approach to digital led to the launch of the Dental Sound Bites podcast last fall, and it is now an award-winning production with 100,000 downloads to its credit. What does it mean to us in the world of operations? A large audience provides the next phase of opportunities for revenue generation.

Just in the last two months, we initiated our mentorship program in the app and started operation. Members can now opt-in to the program through their profile.

Earlier this summer, the ADA launched into a stronger, more proactive presence on social media. This campaign includes an entirely new program of social influencing. In a simple statement - we're not just sitting on the sidelines anymore; we're now in the game.

This past July, we launched the digital ADA Commons, an online repository of state component publications and journals, tailored for dental and healthcare research. This will become our foundation for access to proven scientific and materials research for our members. Again, it also provides our plans for defined monetization as we begin to modernize the value services of our business and membership model.

This year, via our recent integration with Broadcast Med, the ADA is beginning to make its foray into digital-first publishing, which helps us serve the right content to the right audience at the right time.

No longer will we deploy content that is uniform—we're looking forward to the customized delivery of information. In a few years, your Morning Huddle won't be identical to my Morning Huddle, with each instead featuring headlines and stories varying from person to person and based on their individual engagement and interests.

Our progress on digital custom content delivery will extend the reach of our current and future catalog of products and services, as overseen by our Business Innovation Customer Group. We can no longer assume that a person would join the ADA just to be able to call themselves a member — we need to also consider what we provide to them in our products and services. Why? Because that's part of the value proposition for generations to come.

The newly formed Innovation Advisory Committee, which connects to the Business Innovation customer group, guides idea generation along with product and service development, leading to a suite of new offerings beginning in 2024.

The Business Innovation Customer Group is looking even further ahead and laying the groundwork to showcase the ADA's offerings within the international marketplace — including resources pertaining to education, science, and research.

Plus, the strategic partnerships fostered by our subsidiary ADA Business Enterprises, or ADABEI for short, continually add value via the ADA Member Advantage program, which endorses exclusive products, services, and opportunities for dentists.

Looking at these programs in the Direct to Dentist and the Business Innovation Customer groups, now brings into the fold defined opportunities for the income of these successful programs.

Last year, we mentioned the word “revenue” for the first time in quite a while in the context of growth. This year, with the transformation of our infrastructure, we have a definite business plan on how we're driving the reality of the term “revenue” into present and future programs. As we have all known before, we can't expense-control our way into growth.

Excitingly, these new programs will begin to bolster the revenue of our association and create refreshed avenues of growth.

What the ADA provides its community goes well beyond the domain of tangible value and into the expression of our professional values—the ADA reflects what dentists strive to promote, protect, and elevate as providers of essential health care. This is the arena of the Public/Professional Customer Group, which oversees a number of initiatives that advance the profession and improve public health.

In addition to successfully shaping advocacy on dental insurance reform, oral health equity, and licensure portability, the Public/Professional group currently ensures that ADA science, research, and standards are positioned to address the emerging evidence and trends that could affect clinical practice. There are many changes happening, from MLR to the impact of ERISA, and the ADA will be on the forefront of topics like AI-supported dentistry, tele-dentistry, scope of practice, and clinical practice guidelines.

The ADA Science and Research Institute, more specifically, is a key component of our public/professional endeavors... as a center of excellence that drives evidence-based dentistry and improves patient care.

This includes the new upcoming plan of interlacing “B to P”—or benchtop to patient. Our commitment to science and research allows us to create newer translational research that will support each of our members' professional care delivery. This will include a newfound public awareness and growth of our ADA Seal program and dental

materials research – all to better support our dental professionals, their practice modalities, and their careers.

Similarly, the newly reinvented ADA Foundation—which spearheads Give Kids a Smile, Give Vets a Smile, charitable giving, and now includes education support as key areas of focus—is driving an important element of the ADA’s public health activities. Looking ahead, as the Foundation expands its efforts, it is aligning its strategic plan and governance structure to the G-I-V-E, or GIVE, philosophy: Growth, Innovation, Value, and Evolution. This is all done through a new vision of “collaborative giving.” This is a form of collegial charitable giving that works with, not in competition against, all our constituent, component, and other foundations.

The Public/Professional group also focuses on improving test development, pre- and post-doc education, and the continuing education programs that sharpen dentists’ skills well after graduation.

The Public/Professional group also helps the ADA foster collegiality and synergy across dentistry. We’re working closely with the dental education community...the students who will soon comprise the dental workforce and the faculty and administration who are so integral to their success.

I’ve visited dental schools to listen and understand how best our Association can bolster them moving forward. The same is true for our ongoing engagement with the dental specialties and diverse dental societies.

We are embracing dental professionals of all stripes—whether they are in large-group or solo practice, whether they work in the federal services, scientific research, technology, or manufacturing. And often the essential step to being of service to dentists is to support the state and local dental societies they call home. That’s where our Tripartite Customer Group comes in.

The collaborative infrastructure of the ADA tripartite—comprised of local, state, and national—is proof of what synergy and shared purpose can do for the lives of dentists, practices, and patients.

The Power of Three is the power of partnership, and in order to support that, we will launch our new association management system or AMS. Our transition to Salesforce/Fonteva begins in July 2024 ... or 38 weeks, 2 days, 13 hours and 10 minutes... but who’s counting?

We have been and will continue to work hard for our states on this transition and we are placing full emphasis and resources on this conversion at no cost to any of our components and constituents.

Together, we will see the value in the Fonteva/Salesforce system come to life. It's all about simplification... with its provision of a streamlined, single source of membership data, along with robust financial reporting capabilities.

Additionally, next summer's launch of our new AMS will go even further to create a customized personal digital experience for our members.

Further, having a single system will enable all levels of our tripartite to follow members as their careers evolve.

Dentists of my generation often entered practice and stayed put, whereas newer generations might make two to three major shifts in their career, whether in a change of address or change in practice modality. The new AMS empowers us to follow and support them as they go. We have to be ahead of our members' needs.

As I said before, the ADA is absorbing the cost of the Fonteva/Salesforce platform, both in installation and assistance in the transition, making it free to every state and local organization and relieving them of the conversion and installation costs, and in the long run, we will all save millions of dollars in operating expenses.

The ADA recognizes the spirit of partnership; our tripartite is a cooperative ecosystem, where the success of one is the success of us all.

The ADA's operational and strategic support enables our tripartite partners to maximize their resources to prioritize dentist engagement and satisfaction... right in the communities where our members live and work.

The ADA's transformative success is thanks to the Enterprise/Internal group, whose backend support helps us seamlessly function, perform, and excel.

This slide is jam-packed with happenings behind the scenes and a small glimpse of the transformation happening at your ADA.

Much of the dues reduction is from the gained efficiency of our internal support systems. In essence, using today's technologies and best practice systems creates the efficiencies necessary for us to compete.

In a moment, ADA Treasurer Dr. Ted Sherwin will share the blueprint for how we are rebuilding our infrastructure for greater efficiency.

Internally, we've changed to a new report format on how we measure real progress.

The Quarterly Business Review—or the QBR for short—will be tied to the strategic forecast and allows for flexible decision making and prioritization.

This QBR is a report that ties in so many aspects including current missions set forth by you and giving us constant feedback and input on our progress. Think of your car: When driving, do you want your dashboard and navigation system to tell you how the car was performing last week? Or telling you where you were going last month? The QBR shows us what's happening now and what will happen next if we remain on this path.

For our professional team, the Agile method of project management and technology system updates are improving the way we work—allowing for greater collaboration, creativity, and incremental wins on our way to major improvements.

Our leadership bodies also serve a crucial role in meeting our Enterprise/Internal group's objectives. Last year, this House of Delegates approved the ADA's implementation of strategic forecasting. This system is building the framework that is central to the ADA being able to deliver value to our community more quickly than in the past. With the Strategic Forecasting framework, we're going to be moving not at the speed of our governance, but at the speed of the market.

Our decisions are now becoming informed by the wide array of voices and perspectives from throughout dentistry, as represented by the Strategic Forecasting subcommittees and action groups. ADA Councils and Committees elevate their vital role as consultants and subject matter experts.

In the last 12 months, we've moved quickly to stand up our Strategic Forecasting Committee. The committee and subcommittees are in operation, and action groups are in place. Work is underway on the top areas of focus, as identified by the SFC. They include...

- Increased engagement and membership conversion
- Defining the ADA's role in the dental benefits marketplace, and...
- Ensuring organizational effectiveness and sustainability

You have received the first report, which outlines the work completed on establishing its structure, along with review of the ADA's mission, vision, and prioritization of efforts.

This will allow us to complete the last key pieces that we need to focus and deliver the future we desire, and the opportunity to become the disrupter for a change — and not continue to be the disrupted.



I'm confident that we will all soon see the difference our evolution has made. This nimble, inclusive approach to our governance keeps us proactive and lends us the foresight needed to help the ADA thrive in the next 5, 10, 20 years, and beyond.

From where we stand today, there is a lot to be proud of, a lot to look forward to... and a lot of work that remains.

In considering the ADA's value proposition for upcoming generations, we should understand what motivates dentists—past, present, and future—to become ADA members.

Baby Boomers joined the ADA because it was the traditional next step as they became professionals. Joining the ADA after getting your dental degree was the expected norm.

However, newer dentists join because of the value the Association provides for enhancing their professional growth. Their membership is not guaranteed—we have to earn it.

For all the recent changes I addressed earlier, we also know that the ADA cannot survive on its current membership model. But beginning on January 1, 2025, we will introduce a new membership model that meets the needs of current *and approaching* generations of dentists.

Explorations around a revamped membership model have been underway since 2021, and currently, various ADA stakeholder groups are developing a new membership model for dentists of all practice modalities and career stages with a focus on the tripartite.

I am excited that the ADA's Membership Model Task Force has recently established eleven guiding principles for this process. Among them is a commitment to meeting members' evolving needs and to supporting equity across all levels of the tripartite, which I consider critically important. Details on all eleven principles will be shared soon.

Simplification is crucial for the future of the ADA's membership categories. Consistency is needed across the board...no matter where members move or how they work, the ADA as part of our tripartite, will be there with them.

The ADA's transformation provides a demonstrated value proposition for all members. With it, membership will offer them the ability to choose the ADA benefits driven by and best suited to their individual needs. The specific benefits for each membership category are still being defined—and that's okay.

Because innovation often requires that we agree change needs to happen by a certain date, even if we haven't figured out the details yet.

Consider President Kennedy's 1961 declaration that the U.S. would land a man on the moon by the end of the decade, despite lacking the technology and resources for such an endeavor. And yet, on July 20, 1969, Neil Armstrong stepped onto the moon's surface.

I'm certainly not equating the ADA's new membership model to the lunar landing. But the Apollo mission proves what's possible when we set a goal and make it happen.

We're well into outlining the specifics of the new membership model, with initial guidelines due next month and the final model to be completed by March 2024. You will be informed every step of the way, right through the launch on January 1, 2025.

The new membership model will also allow for both annual and monthly membership payment options—which many dentists can include within their monthly budgets more easily than a large lump sum every year.

Here's another exciting part: In listening to the needs of our members, along with our tripartite partners, the ADA is taking a step back in cost, to ensure member and partner satisfaction in what we ask each member to invest.

Typically, we would use the word "dues" in this context. But I believe the word "dues" implies that our members should pay a tax in order to be part of this professional community. They already play a role in the dental family, so in truth, ADA membership is really a dentist's reinvestment in his or her career, community, and profession.

As the ADA better allocates its resources toward high-value, high-impact activities to benefit our members and customers, I suggest we retire the word "dues" because we are moving beyond merely reducing membership to a transaction. Instead, in the ways I've outlined today and in many ways to come, we are promoting membership in the American Dental Association for its relational and professional value.

In closing... I want to share a valuable lesson I learned from my uncle Nick Harroz, founder of the Oklahoma grocery store chain Crest Foods. He always said, "There are only two choices—you're either expanding or you're going out of business."

He taught me that if you hold the status quo, you fall behind and limit your future success. Expanding means that we look through the windshield at what lies ahead, and not the rearview mirror at what's passed. To do what we are uniquely called to do to get where we need to be.

He reminded me that we are all capable of not only dreaming of an expansive future but creating one—if we put in the effort. Simply stated, he'd always say, "Get off your rear and make it happen."

Painting the future and putting the hard work toward it...That's what the Carousel of Progress is all about—not just Disney's, but the American Dental Association's.

Progress is not just an aspiration...progress will be our legacy—if we move fearlessly together toward the American Dental Association that we imagine for ourselves and for posterity.

To paraphrase Walt Disney, "It's not the magic that makes the ADA work... it's the way we work now that will make the ADA magic."

So, as we move in our own Carousel of progress into the scene of the future and to the next level of innovation... I wish to thank all of you here to today, along with the hundreds of ADA volunteers who are making transformation possible. Plus, the partners at our state and local societies who are vital to the ADA's success and that of our members.

Many thanks to the ADA Board of Trustees and to Outgoing president Dr. George Shepley for his steady, level-headed leadership and for his friendship. And to incoming president Dr. Linda Edgar, I'm looking forward to all we will create together in the coming year.

Thank you to the ADA's Professional Team, who all have worked very hard to get us to this point.

Lastly, thank you to my family – especially my wife Sherry who is the reason I keep going every day.

Now it's time to synchronize our watches for January 1, 2025... a moment that will usher us further into the ADA's new day.

We've set the date...and now it's time for all of us—as leaders and visionaries—to get to work.

To do what we are uniquely called to do to get where we need to be...

We've got a whole new century waiting for us out there. What will we think of next?

And most importantly...what will we create?

Thank you all.