

NATIONAL · STATE · LOCAL

## **ADA Presidents-Elect Conference**

Sponsored by: ADPAC



ADA American Dental Association®

## **Welcome Remarks**

**Dr. George R. Shepley**ADA President-Elect



# How to be a Change Hero

Dr. Steve Shepard, MBA, PhD
President, Shepard Communications Group



## White Board Activity

Please review the sheet you received at your tables, and think about the answers to the questions listed.

- 1. What value did you learn to share with members and non-members?
- 2. As the President-Elect, what actions can you take to be the change hero to promote, implement and enhance the value?



2022 ADA State Presidents-Elect Conference

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Question: How can you take everything you've learned at this conference and use it to create true, impactful solutions in your state?

Answer: Let's drive change together!

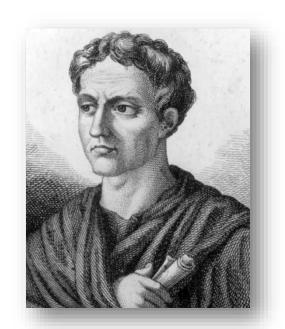
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I was to learn later in life that we tend to meet any new situation by reorganizing, and a wonderful method it can be for creating the illusion of progress while producing confusion, inefficiency, and demoralization.



-Petronius Arbiter, Emperor Nero's Minister of Communications



# Change. Why?

- First and foremost: Dentistry is evolving (at every level): We can ride the wave, or be buried by it
- Avoidance of status quo
- Demonstrates commitment
- Opportunity to involve staff in business evolution
- Deliberate act to defy complacency
- Recognizes change as an important life/work factor
- And—we can't stop it





Change: The act of becoming different.

**Hero**: a person who is admired for courage or outstanding achievements.

Critical: The role of culture in the change process.



# Change Manager vs. Change Leader— What's the Difference?

#### Manager

- Tactical/Operational
- Day-to-day event coordination
- 'Keeps the lights on'

#### Leader

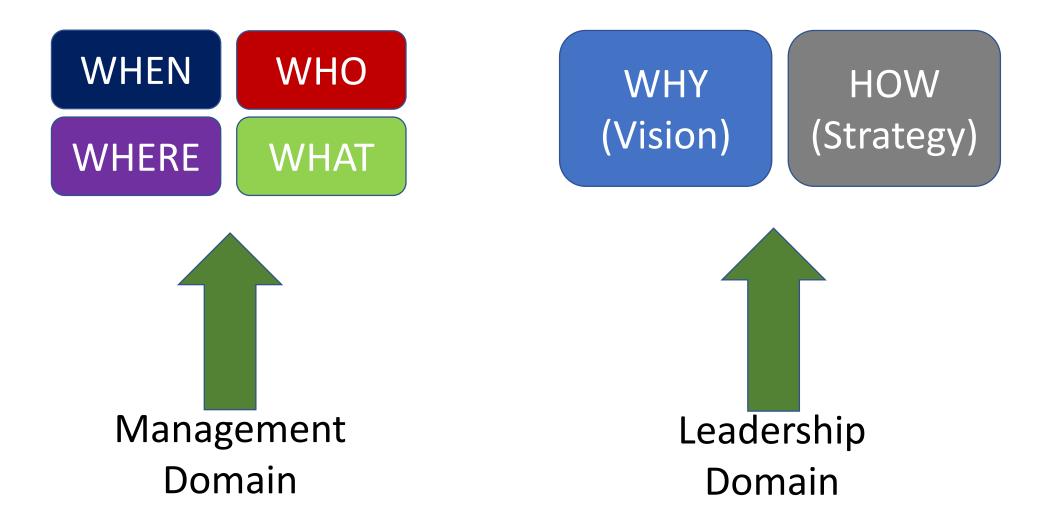
- Strategic
- Long-term focus
- Ensures there's a reason to have lights to keep on!

Change Management

Change Leadership



## The Power of Adverbs





The personality or the soul of an organization—the articulation of a company's shared beliefs and values.

Values

# Culture. Mission

A set of norms and values that are widely shared and strongly held throughout the organization.

Vision







# "Slogan Leadership"



#### **AMBITION**

Sometimes the journey of a thousand miles ends very, very badly.

## 'Culture Shift'

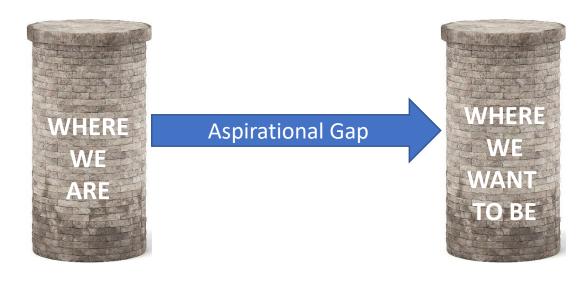
 Demand for a "culture shift" – meaning, what, exactly? What is 'culture'? And why does it need to change?

Culture changes ONLY IF techniques used are out of character with

rules that govern old culture - why?

 Can't allow existing culture to dictate terms and conditions of how change will occur

 Culture shifts MUST be guided by where the organization needs to go, not where it has been



 Never forget: Loyalty to organization is essential; loyalty to culture is optional



## Measurement & Reward Systems

- No changes to the reward system? Reward resistance
- People MUST see big payoff for altered behavior
- REMEMBER: Existing culture is sustained by current reward structure – so change the structure!
- Measure change, reward results
- Give everyone personal accountability for transformation
- Don't reward those who perpetuate old culture
   Don't allow "upward delegation"



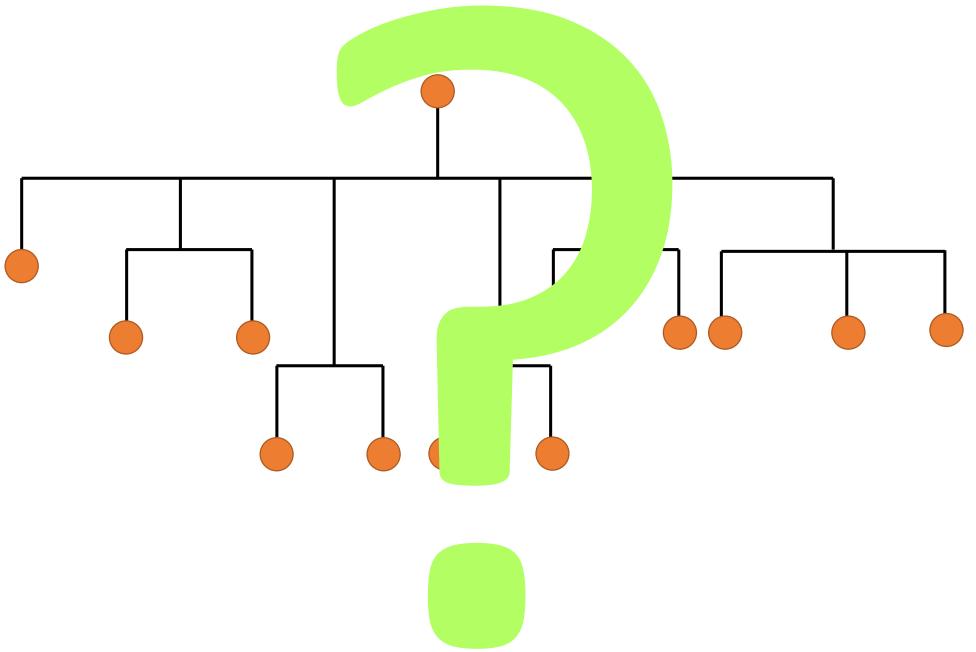


## Irony of Transformation

- Employees feel busier than ever, but productivity is down
- Busy leads to burnout, burnout to loss of commitment
- Change causes emotional attachment between employee, company to weaken
- Two types of employees emerge ...
- MUST re-recruit employees you want to keep



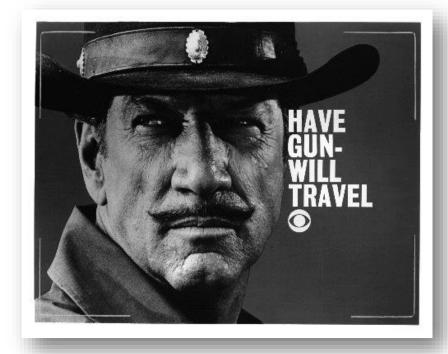






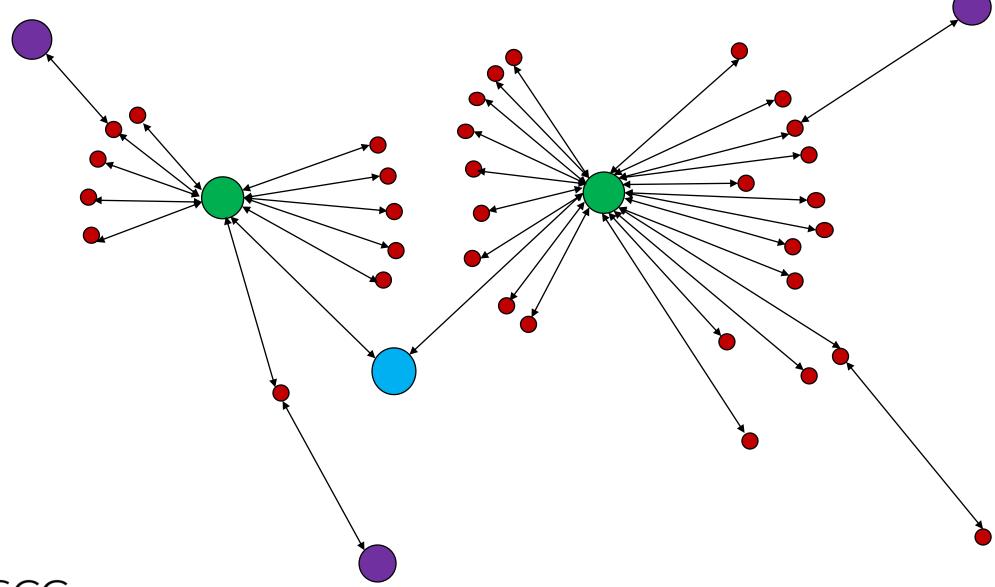
## Why Informal Networks Matter

- Foster innovation through non-traditional (but highly-functional) practices
  - Google 80:20 requirement, 3M 15% Rule
- Serve as learning mechanisms for the spread of best practices
  - Peers training peers
  - Identify hidden skills
- Accumulate and archive wisdom (institutional memory)



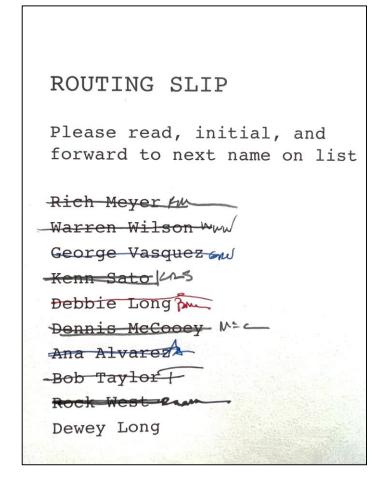


## Building a Sociogram

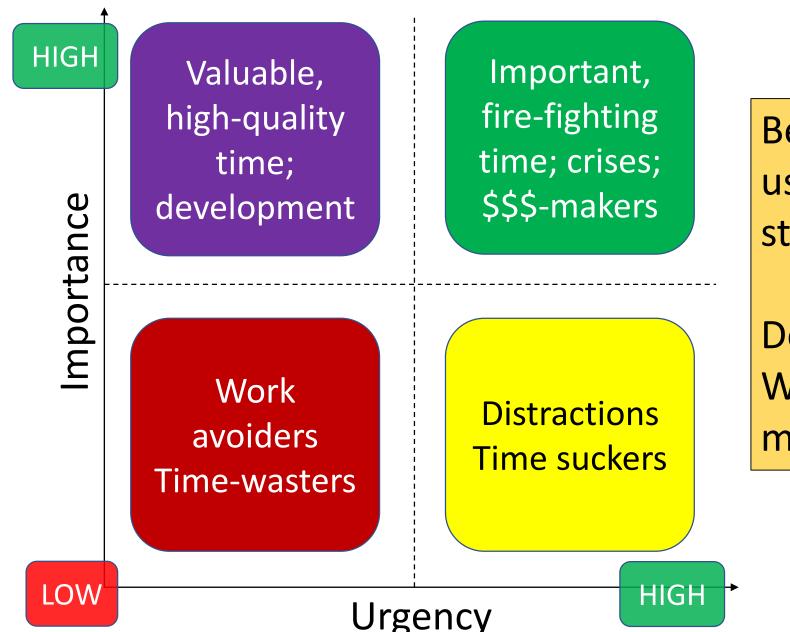


## Remember These?









Be deliberate about time usage—for you AND your staff.

Do an activity inventory— What do people spend most of their time doing?



## How to Be a Change Hero (for Everyone!)

- Create and communicate the vision
  - Understand your audience and articulate your ideas in ways that resonate with what they are concerned with: WHY, not WHAT
  - Just because you think something is important doesn't mean they will—and vice-versa
- Create a sense of urgency around the need for change
- Remove obstacles
- Create short-term wins
  - Build on them
- Anchor changes in the corporate culture



## How to Be a Change Hero (for Everyone!)

- Identify your span of control and influence
  - Probably greater than you realize
- Seek out champions
  - Recognize hidden skills, assets
- Challenge your own beliefs and assumptions
  - o What's real? What's dogma?
- Finally, make change the responsibility of everyone in the organization



## Thank you!

Steven Shepard +1-802-238-1007 Steve@ShepardComm.com

## White Board Activity

#### **Driving Change Together**

1. How to Be a Change Hero

- 5. Driving Digital Innovation
- 2. The Future of Oral Health in America
- 6. Value / Values in Advocacy
- 3. Value / Values in Membership
- 7. Governance Topics

4. New Dentist Panel



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## Networking Break

Thank you to our Sponsors



ADA American Dental Association®



#### The Future of Oral Health in America



Marko Vujicic, PhD
Chief Economist and Vice President
ADA Health Policy Institute



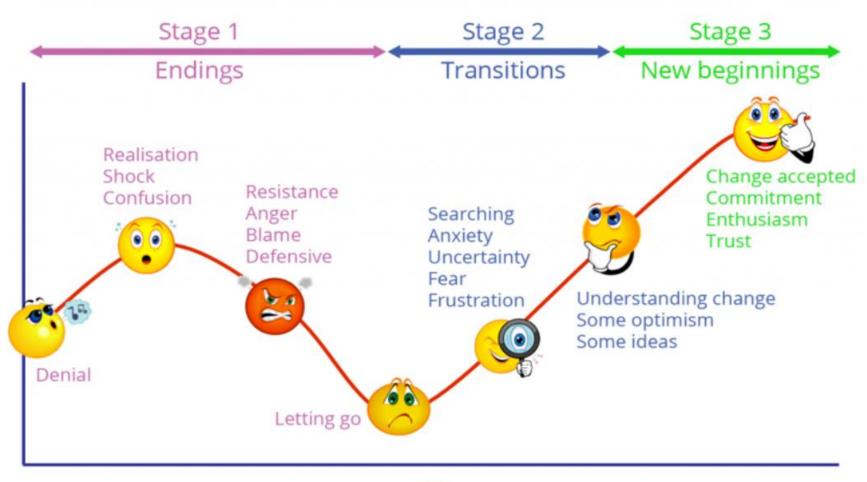
Dave Preble, DDS, JD, CAE
Chief Strategist and Senior Vice President
ADA Practice Institute

## Today



- 1. Update on some key trends in oral health in America
- 2. Some soul-searching questions about organized dentistry's vision for the future

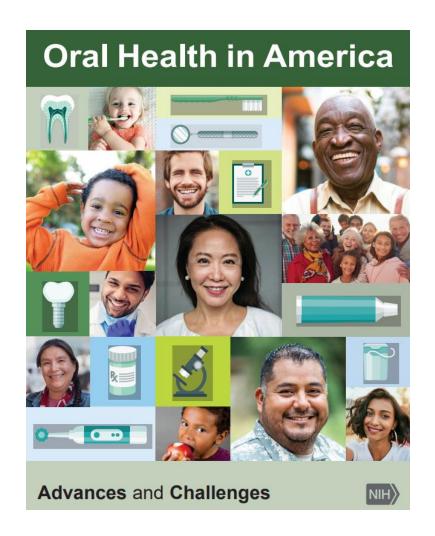
#### This Will Probably Get Uncomfortable....That's OK



Recognize your emotions around change!

**Time** 

#### Lots of New Data on Trends in the Past 20 Years



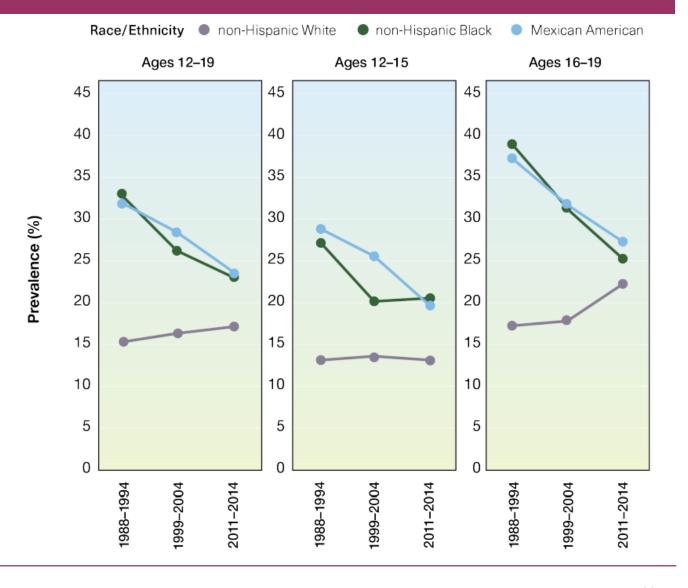


## Key Takeaways We Want to Highlight

- 1. **Mouth is connected to body.** Lots of new, compelling evidence today about oral health's link to overall health and well-being, health care costs, and the economy.
- 2. Big gains in oral health among kids. Steady improvements in most oral health measures, big increases in dental care visits. Largest gains have been among low-income children and non-white children. These improvements driven by significant expansions of dental coverage for kids, primarily through public programs.
- 3. Much less progress for adults and seniors. For working-age adults, oral health outcomes have not improved. Dental care use has been declining very slowly. Disparities by income and race have been stable. For seniors, some improvements in some oral health outcomes, but mostly among the wealthy.
- 4. Cost barriers are really important. Dental care stands out from other health care services in terms of being unaffordable. Working-age adults, especially low-income adults, face the highest cost barriers to dental care. Cost is the top reason adults and seniors do not go to the dentist.
- 5. **Big picture**, the current model of dental care delivery and financing is working fairly well for three groups of people: kids, middle- and upper-income adults and seniors, and providers. There is huge upside to expand the patient base...but it will take a big departure from the status quo.

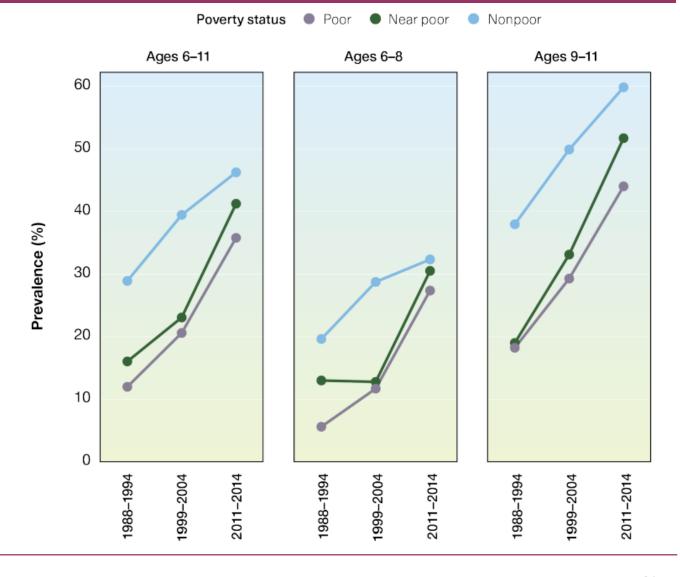
#### Prevalence of Untreated Caries – Children

There have been major reductions in untreated caries among non-white adolescents. Disparities by race are narrowing.



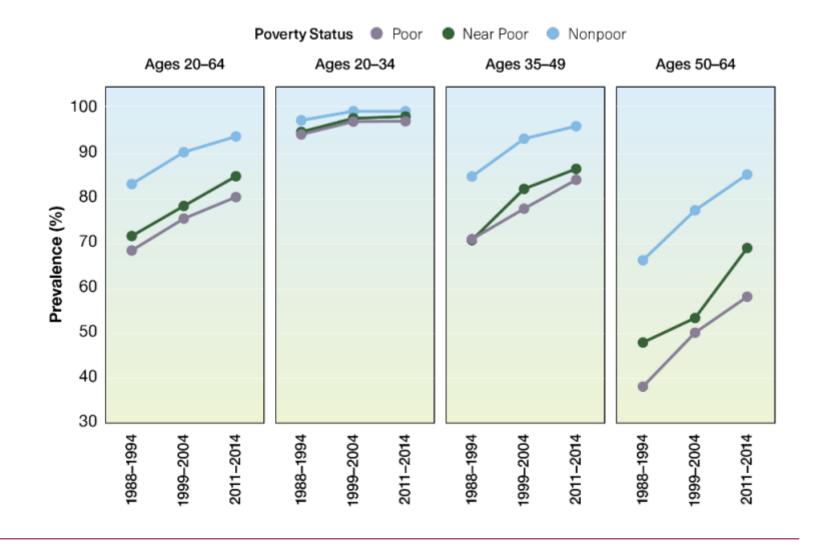
#### Prevalence of Dental Sealants – Children

Sealant use has increased, particularly for low-income children. Disparities by income are narrowing.



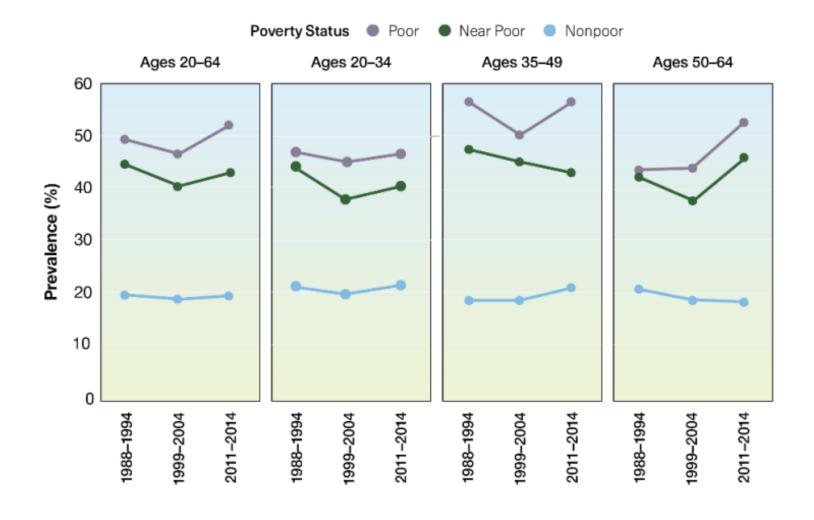
#### Prevalence of Functional Dentition – Adults

There have been gains in functional dentition.
Disparities have not narrowed over time, unlike for children. In addition, as people age, these disparities magnify.



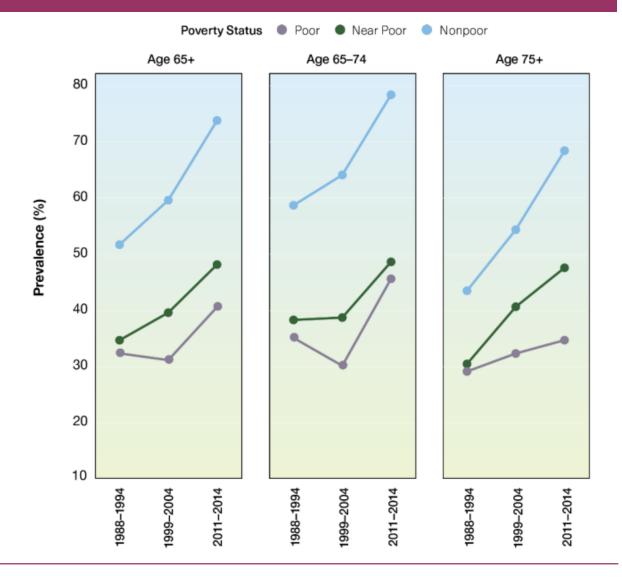
#### Prevalence of Untreated Caries – Adults

Untreated caries rates
have not changed
much, and if anything,
have increased for lowincome adults.
Disparities by income
have widened.



#### Prevalence of Functional Dentition – Seniors

There have been gains in functional dentition, most significantly for high-income seniors. Disparities by income are widening.



## Half the Population Not Seeing a Dentist Regularly



About 40-50% of the U.S. population visit the dentist within the year.

Rates have increased among kids and seniors, decreased among adults.

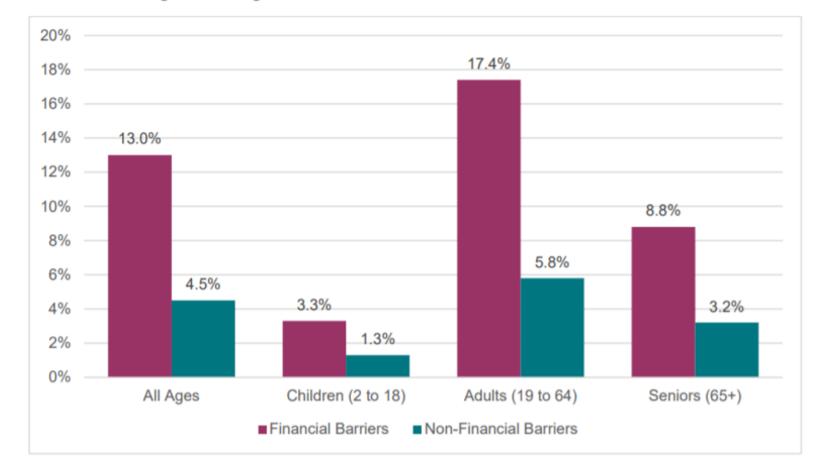


#### Why Don't More People Visit the Dentist?

Percentage Indicating Financial and Non-Financial Barriers to Needed Dental Care

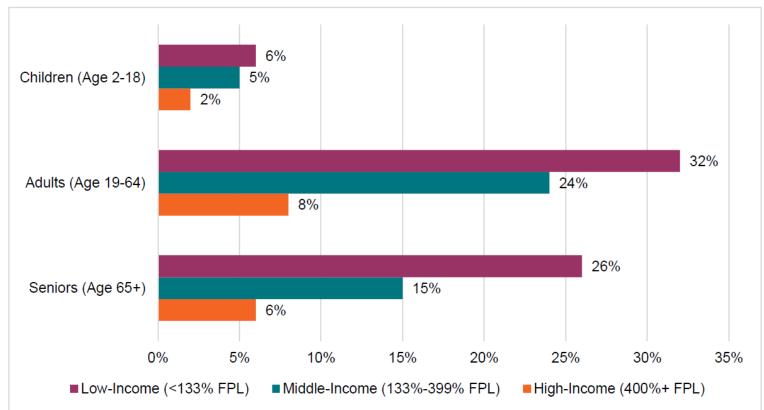
By far, cost barriers are much more important than any other type of barrier when it comes to visiting the dentist.

Adults face more barriers to dental care than children and seniors.



#### Low-Income Adults Face the Biggest Cost Barriers

Figure 1: Prevalence of Cost Barriers to Dental Care by Age and Income Level

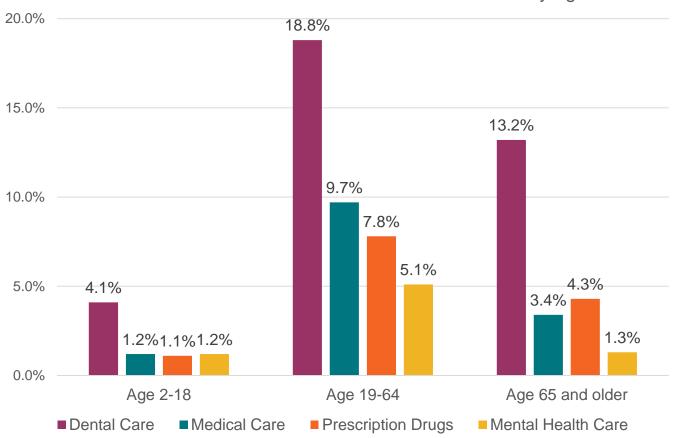


Of any age and income group, low-income adults face the most significant cost barriers to dental care.

**Source:** Health Policy Institute analysis of National Health Interview Survey data for 2019. **Note:** Percentages indicate those who needed dental care but did not obtain it in the past 12 months due to cost. FPL: federal poverty level.

## Dental Care Stands Out as Being 'Unaffordable'



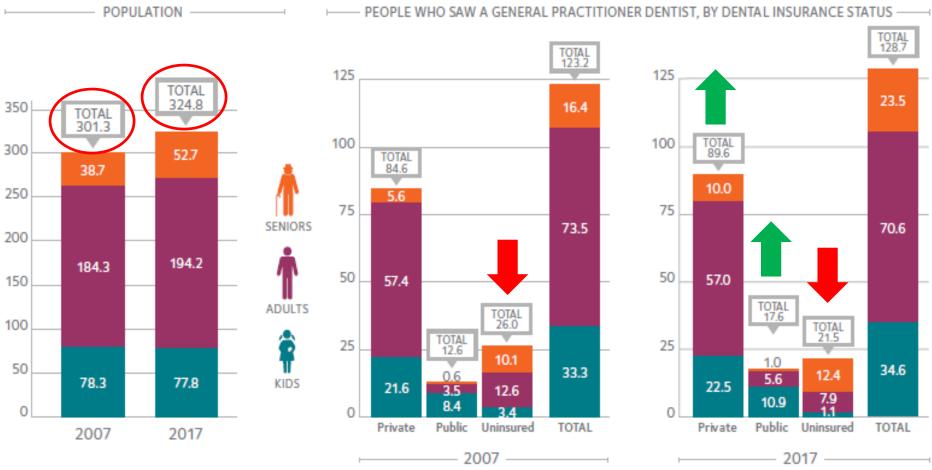


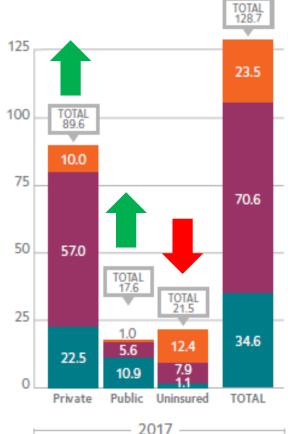
Cost barriers to dental care are higher than for any other type of health care service.

**Source**: Health Policy Institute analysis of National Health interview Survey data for 2019. Unpublished. **Note**: Percentages indicate those who reported they did not obtain needed services in the past 12 months due to cost.

## The Shifting Patient Mix

#### BREAKDOWN OF THE NUMBER OF AMERICANS VISITING A GENERAL PRACTITIONER DENTIST (IN MILLIONS)



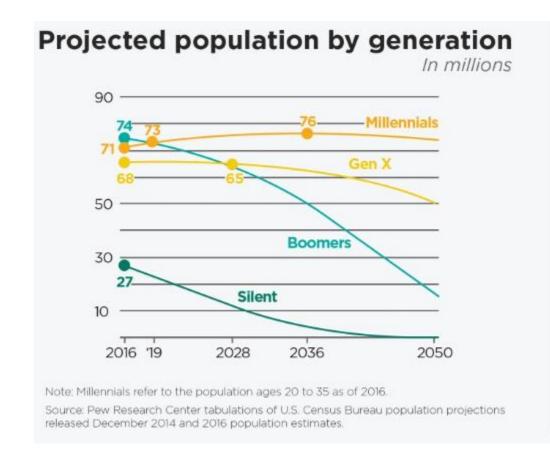


The insured patient base is expanding. Both public and private.

The self-pay patient base is shrinking... and is about to go off of a cliff as senior #s start to decline.

#### Patient Mindsets are Changing

There is a significant generational shift happening in the U.S. population. Millennials are flexing more economic muscle.



#### GEN Z

Born 1997 and later Age in 2019: 22 and younger

#### Millennials

Born: 1981 to 1996 Age in 2019: 23 to 38

#### Gen X

Born: 1965 to 1980 Age in 2019: 39 to 54

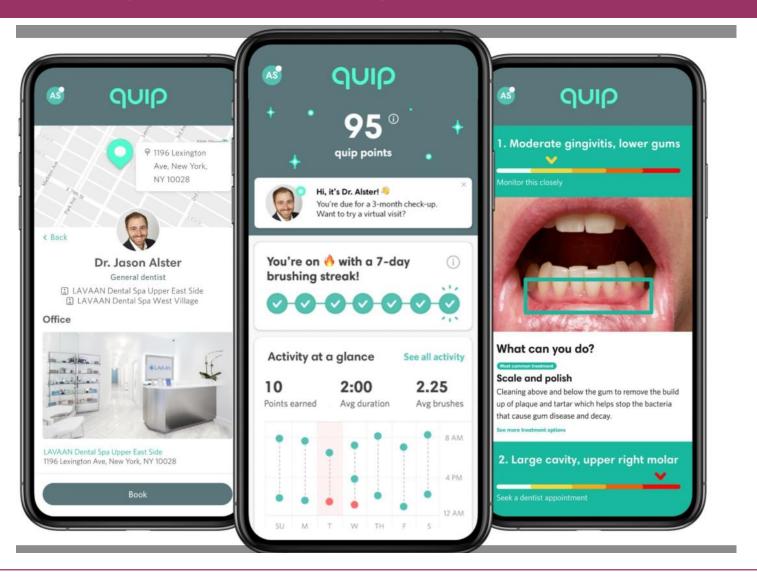
#### **Baby Boomers**

Born: 1946 to 1964 Age in 2019: 55 to 73

#### The Silent Generation

Born: 1928 to 1945 Age in 2019: 74 to 91

#### A Generational Shift in Patient Mindset



Millennial patients want to interact with health care providers much differently. Get used to it.

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#### The Fork in the Road for the Profession

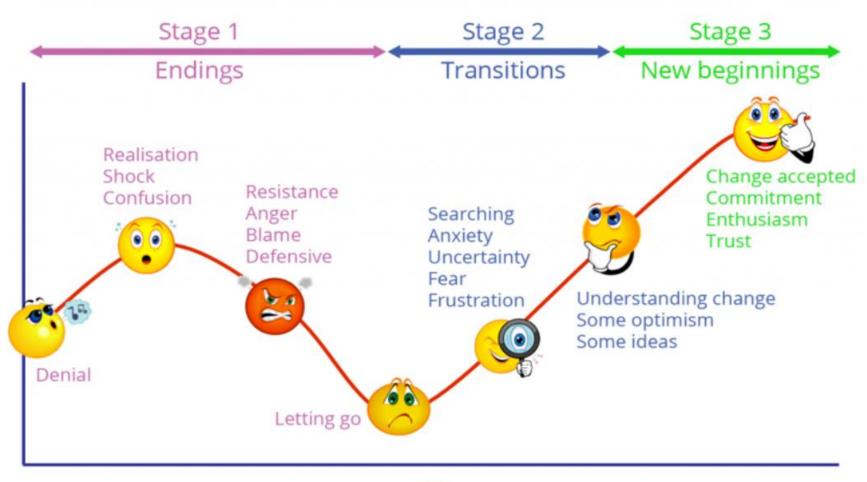
1. Is our vision that half the population go to the dentist regularly and half do not? Are we OK with that?

2. Do we really feel that dentistry should be considered 'essential' health care under federal and state health policy?

3. How intensively do we want to partner with the medical community to integrate dentistry into primary care?

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#### This Will Probably Get Uncomfortable....That's OK



Recognize your emotions around change!

**Time** 

#### Thank You!



**ADA.org/HPI** 

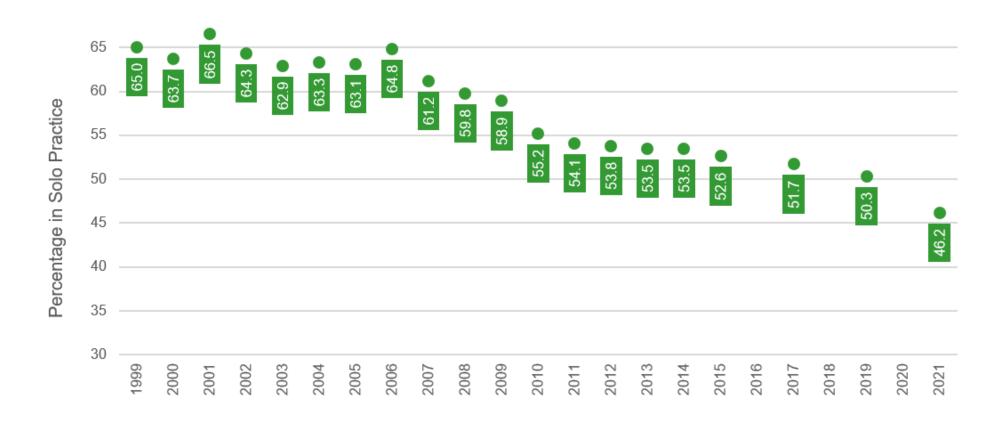
ADA.org/HPIConsulting

hpi@ada.org



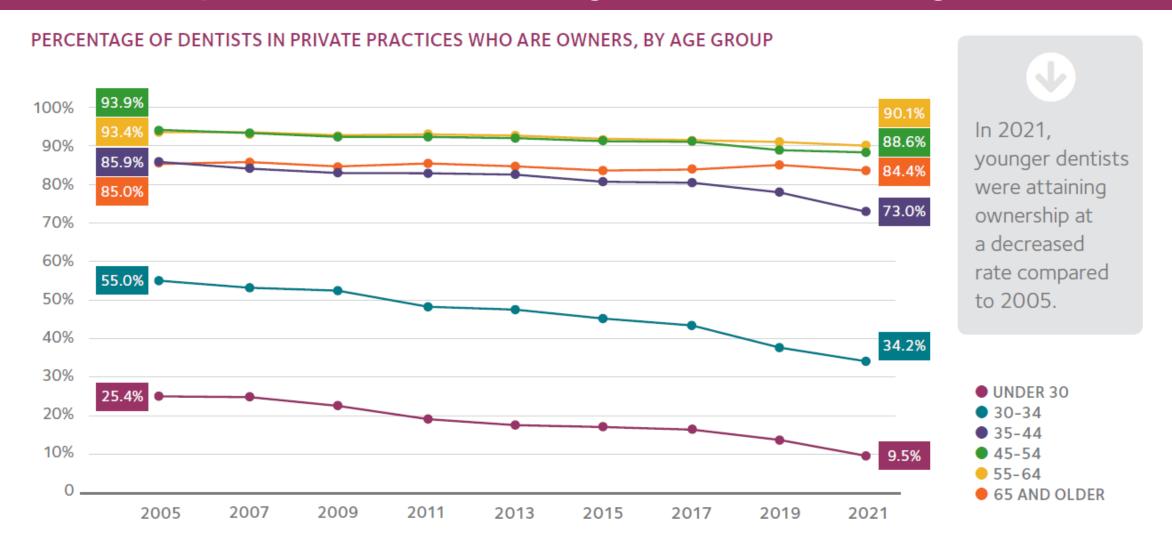
**ADA** American Dental Association®

#### Fewer Dentists are in Solo Practice

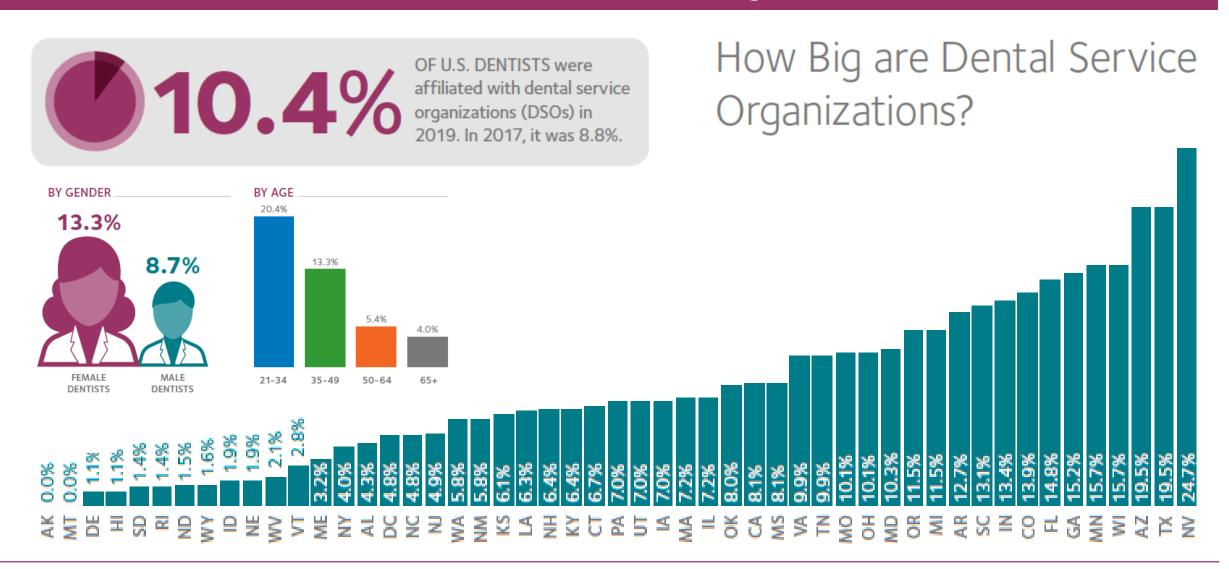


Solo practice continues to decline. This trend is accelerating.

## Ownership Rates are Declining Fastest for Young Dentists



#### Practice Consolidation is Accelerating



#### Practice Consolidation is Accelerating



**ORTHODONTICS (12.5%)** 



**PEDIATRIC DENTISTRY (12.4%)** 



**GENERAL PRACTICE** (10.3%)



**ALL SPECIALTIES (10.2%)** 



**ORAL SURGERY (9.6%)** 



**PERIODONTICS** (8.6%)



**ENDODONTICS (8.4%)** 



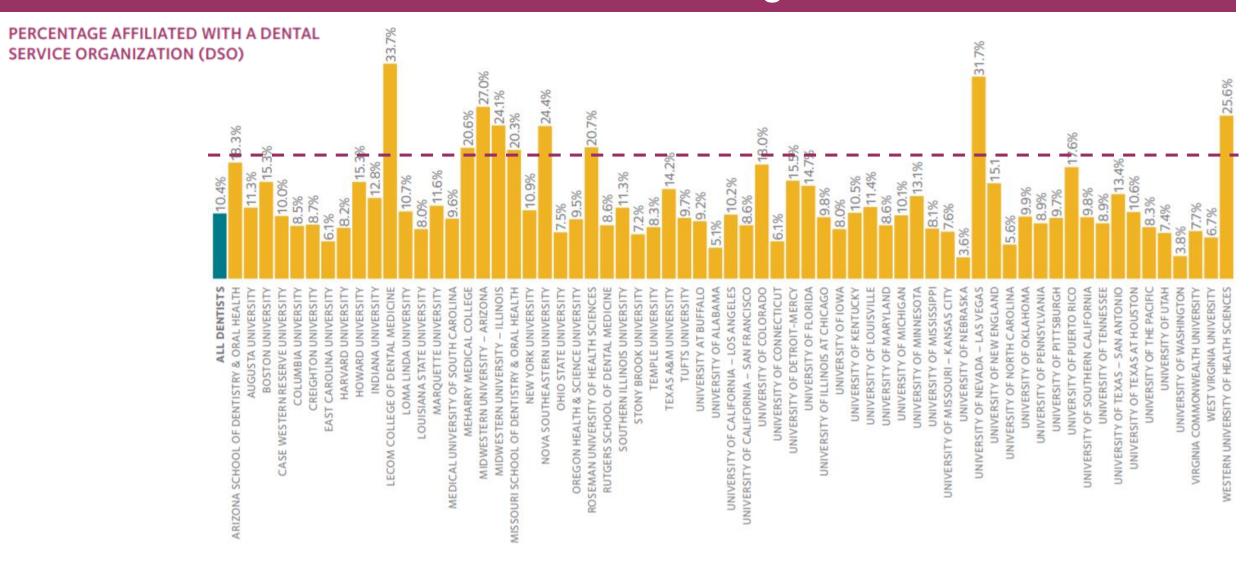
**PROSTHODONTICS (6.6%)** 

How Big are Dental Service Organizations?

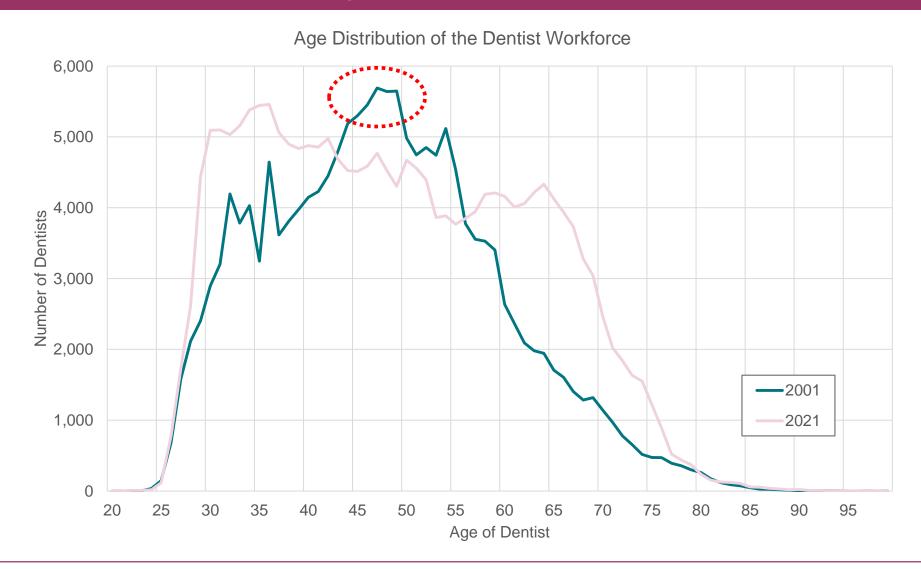


OF U.S. DENTISTS were affiliated with dental service organizations (DSOs) in 2019. In 2017, it was 8.8%.

#### Practice Consolidation is Accelerating



## We Have a Major Generational Divide

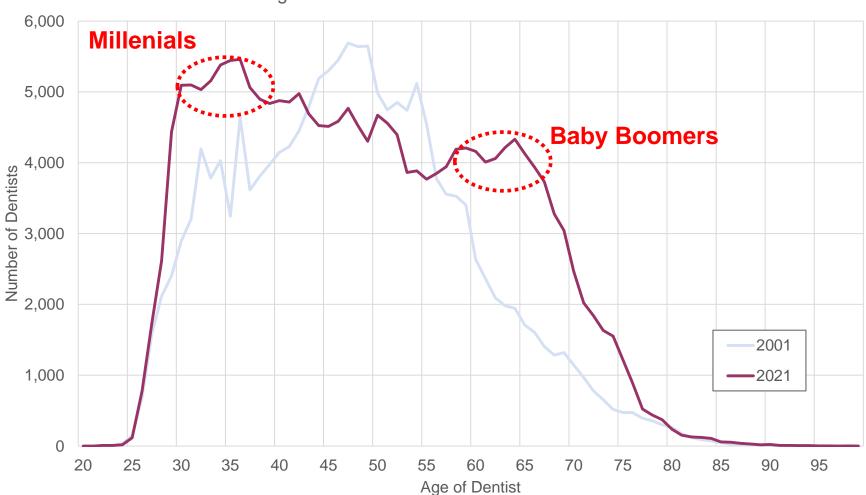


Twenty years ago, there were lots of dentists in their mid-40s.

There were not a huge number of really young or really old dentists.

## We Have a Major Generational Divide





Today is different.
There is a clear
generational divide –
lots of retirement
age dentists and lots
of young dentists.

## White Board Activity

#### **Driving Change Together**

- 1. How to Be a Change Hero
- 2. The Future of Oral Health in America
- 3. Value / Values in Membership
- 4. New Dentist Panel

- 5. Driving Digital Innovation
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# Value and Values: Navigating the Generational Demographic Membership Shift

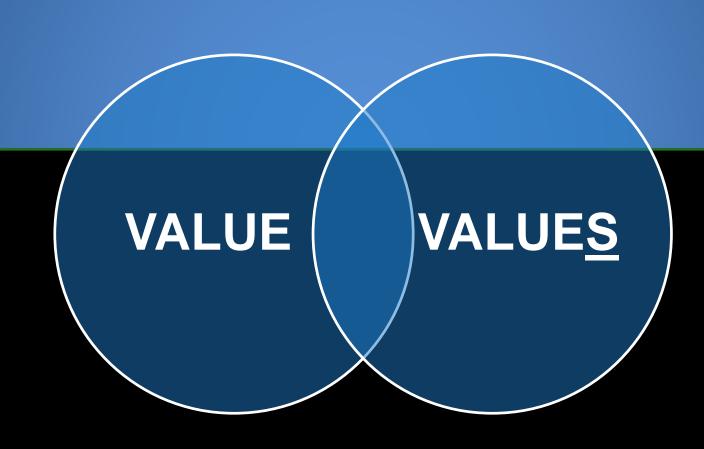


April Kates-Ellison, MS, CAE
Vice President
Member and Client Services, ADA



Stephanie Moritz
Chief Marketing & Communications Officer,
Integrated Marketing and Communications, ADA

# Navigating the Generational Demographic Membership Shift



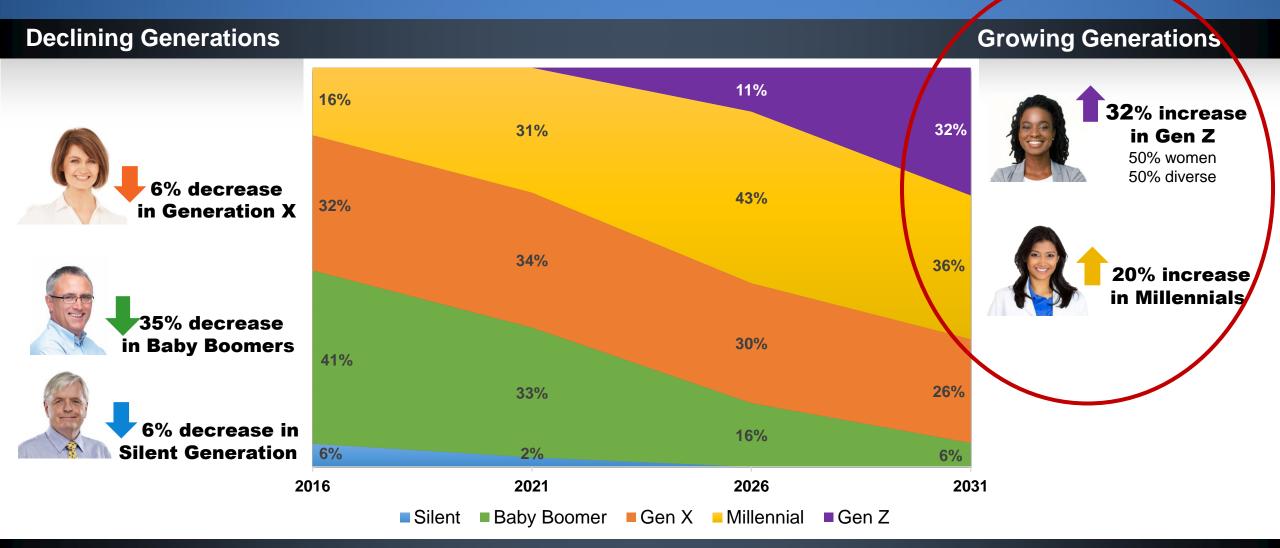
#### The Generations



**Generation**: group of people who share a common place in history and therefore develop a common set of beliefs and values that tend to be common across the entire generation.

Generations create history, and history creates generations. Generational change is a repeating cycle of four, twenty-year cycles, each cycle being a generation.

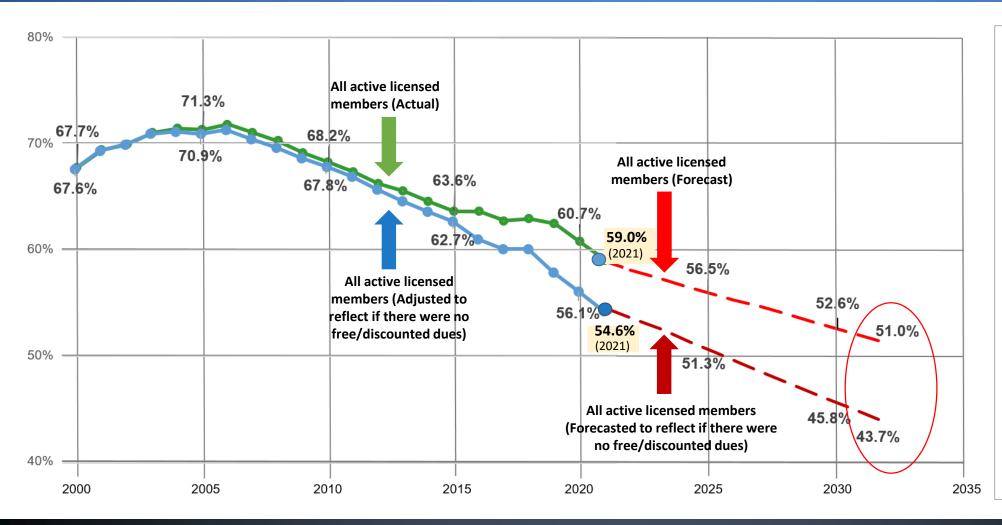
#### **Generational Shift: 2016 – 2031**



# A Sense of Urgency

**Current State of Membership** 

#### **Actual and Forecasted Market Share: 2000 – 2032**

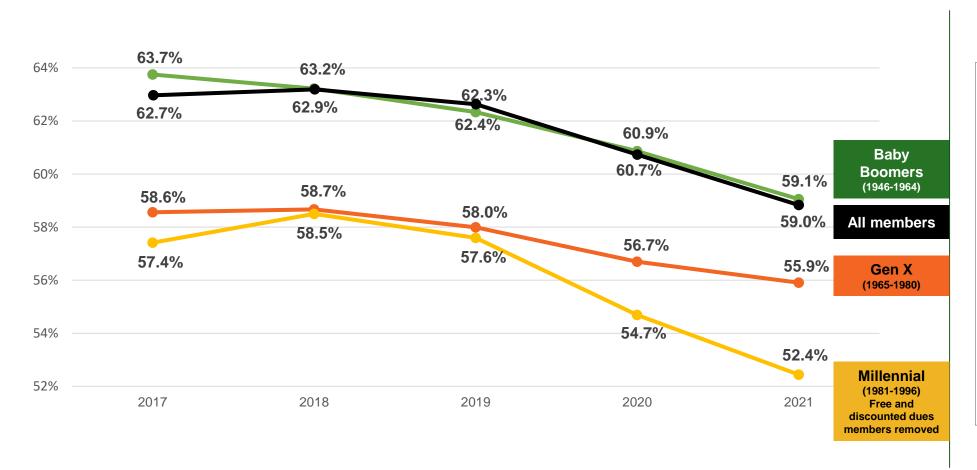


The downward market share trend is forecasted to continue through the next 10 years if the ADA continues on its current path.

If the **59%** market share in 2021 is adjusted to reflect no free or discounted dues membership, the market share would be **54.6%**.

The gap is forecasted to increase by 2032, with total market share forecasted to be **51%**. If free and discounted membership were not offered, the adjusted total is forecasted to be **43.7%**.

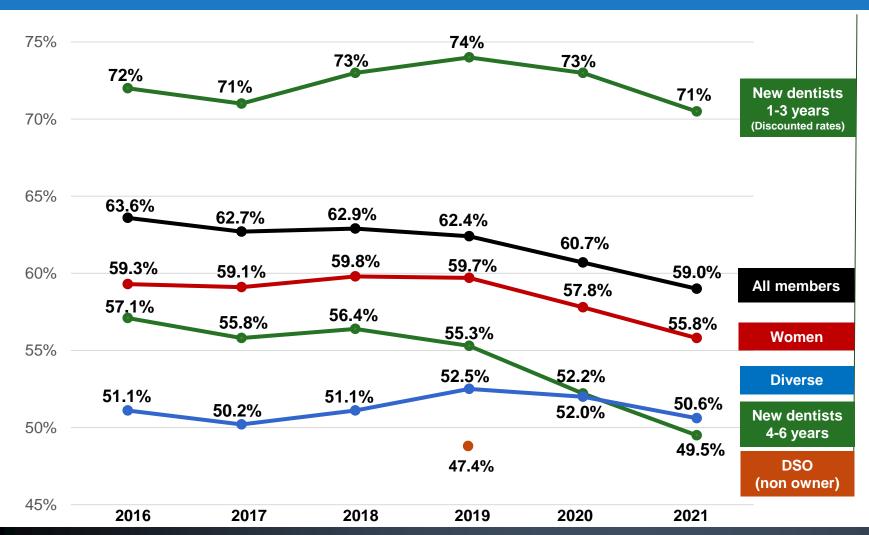
# **Current ADA Market Share: Widening Gap for Generational Segments**



The All Member market share is being boosted by Baby Boomers and free/discounted early career members. When the free/discounted members are removed, actual market share is 54.6%

The younger generations' market share foreshadows the future market share trend.

# **Current ADA Market Share: Widening Gap for Growing Segments**



**Risk:** Broader diversity is now reflected in the profession, including women, ethnically diverse, and group practice dentists.

These growing market segments represent the demographics where ADA market share tends to lag.

Ongoing membership gaps will lead to continued reductions in overall market share, specifically with new dentists entering the profession.

#### The Early Career Pipeline

Class		Years since graduation								
	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	
2010	70.1%	63.4%	61.2%	59.4%	57.3%	57.3%	57.3%	56.1%	55.6%	
2011	72.0%	64.0%	59.2%	57.2%	56.4%	55.6%	55.5%	54.4%		
2012	74.2%	63.9%	59.9%	58.4%	57.0%	56.4%	55.2%	52.3%	51.6%	
2013	74.5%	61.3%	58.0%	56.5%	55.3%	54.0%	51.4%	50.0%		
2014	71.8%	61.7%	57.7%	57.9%	54.8%	51.3%	49.9%			
2015	92.5%	61.5%	58.7%	56.7%	51.3%	49.0%				
2016	92.7%	67.7%	59.6%	53,8%	49.7%					
2017	92.9%	65.0%	56.2%	49.9%						
2018	97.0%	63.4%	54.2%			Market share declines rapidly when they reach a dues rate above \$0				
2019	98.8%	60.3%								
2020	96.9%									

Data in red as of 12-31-21

#### **Key Market Share Disruptors:**

- ✓ Impact of Covid-19
- ✓ Impact of dues streamlining
- Impact of workforce shortage and increased labor costs
- ✓ Accelerated Retirements
- Impact of growth and consolidation of large group practices
- Ongoing demographic shifts
- ✓ Increased competition
- Conscious consumerism

## **Business Urgency to Shift**

- Without shifting immediately, membership gaps will lead to continued reductions in overall market share, specifically with new dentists entering the profession.
- ➤ The credibility and influence of the ADA is compromised if membership market share falls below 50%.
- ➤ Without a shift, in 5-10 years, the ADA will not have sufficient market share to be the leader in dentistry.
- Ultimately, loss of market share will compromise revenue, representation and reputation.

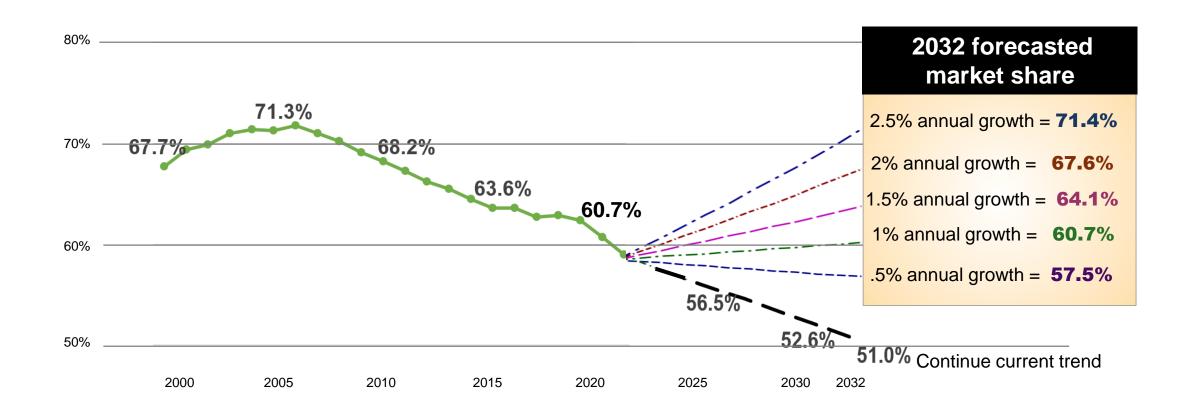
#### Everyone Has a Role in the Shift – A Call to Action

- Boards accept, support with decision making and resources and champion change across the Tripartite
- Council & Committees accept, support with decision making and resources and champion change across the Tripartite
- ➤ ADA Team align resources and activities across the organization to support the target customer/market (leveraging a new customer centric lens tool) accept, support with resources and champion change across the Tripartite
- > States/Locals staff and volunteers leverage new information to facilitate the shift at the grassroots level

# A Vision for the Future

**Future State of Membership** 

## Visionary Forecasted Market Share through 2032





## Overall Findings (Drive Change Together)

# Align with and enable state and local societies



Help state and local societies support their members.



For many dentists and dental students they engage the most at the grassroots level.

#### **How Do We Get There?**

# Transforming Value and Values

For Growth & Sustainability



We surveyed 1,045 dentists across seven key segments

151 Student members

150 Boomer members

210 Gen X members

221 Millennial members

55 and younger

159 Racially and ethnically diverse non-members

112 White, male non-members

101 White, female non-members

#### Areas of focus

- Build a deeper understanding of the relationship members and nonmembers believe they have with the ADA.
- Quantify how members' and nonmembers' values impact decision making, perceptions, and behaviors.



# The VALUE Transformation

Value: the tangible products and services members receive in exchange for their dues



# Deliver value to me

Many dentists join the ADA as a rite of passage in dental school.

Over time, as fees increase and they become more established in the profession, dentists become increasingly critical of the value of membership, especially when they don't feel personally supported or seen by the ADA.

#### The Opportunities:



Representing the professional and personal diversity of *all* dentists



Being an ally and advocate, especially in times of change

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#### Where the ADA Falls Short for New Dentists Members

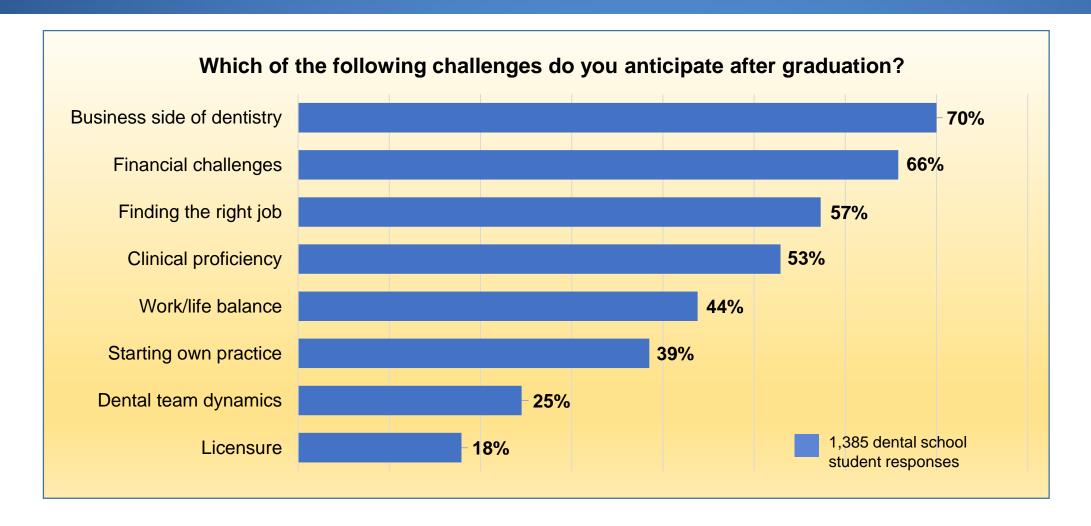


Survey responses from 300 new dentist members in December 2021

## Where the ADA Falls Short for Non-renewing New Dentists

What could the ADA do to be more valuable for you? #1 write-in More free/affordable CE, better offerings response – even higher than their Lower dues desire for lower Influence insurance companies dues Eliminate Tripartite requirement Help with student loans / lower tuition Represent all dentists Facilitate better networking Write in responses from 300 More focus on employee dentists new dentists 1-5 years pending cut-off in Summer 2021

#### Where Students Want Support When they Graduate





#### Back to Basics: New Dentists Want Tangible Value

Professionally, new graduates tend to

be in the **Safety Needs** 

phase & moving into

**Love and Belonging** 

Safety is more than being *employed*. It is feeling *secure* in your employment – clinically, financially and mentally.

Maslow's Hierarchy of Needs

#### **Self-actualization**

desire to become the most that one can be

#### **Esteem**

respect, self-esteem, status, recognition, strength, freedom

#### Love and belonging

friendship, intimacy, family, sense of connection

#### Safety needs

personal security, employment, resources, health, property

#### Physiological needs

air, water, food, shelter, sleep, clothing, reproduction

Established dentists and volunteers leaders tend to be here

#### Early Career New VALUES Development Strategy & Implementation

What they've told us they want:

## Oral Health Advancement

- Resources and support for dentists and their varying patient populations
- Advocacy for underserved populations
- Healthy Equity in Action

Q1

Q3

Opportunities to give back to their communities

# Community and Representation

- Build communities around shared identity-based affinity groups.
- CE, speakers and leadership at all three levels of the ADA that reflect their gender, age, diversity, practice choices

### Change Via Inclusion

Walk the Walk on living the ADA's values

What's planned in 2022

- D&I Joint Action team kick-off meeting
- Activate Health Equity Action Plan
- Launch DE&I Champions Program and Release D&I Lens Tool
- Continue DE&I Roadshow at the grassroots level
  - Develop minimal viable products (MVPs) in support of the three pillar strategies
- DE&I/Oral health events/activities featured at SmileCon

# The VALUES Transformation

Values: the personal and professional principles and beliefs that guide decision making and actions.



# Deliver Value to the Profession (Live our Values)

Dentists are not interested in seeing the ADA take a stand that divides the profession, yet they do expect the ADA to authentically deliver against its stated core values.

They expect the ADA will help them help patients by addressing inequities in health outcomes and access to care.

#### The Opportunities:



"Walking the walk" on diversity and inclusivity



Supporting dentists in improving patient health

# Not all dentists feel supported by the ADA

Adding further complexity to a shifting landscape are increasingly diversified professional identities. Dentists operate in different practice types, specialize in different areas, practice in myriad settings, have varying professional interests and levels of experience, and bring different personal experiences and perspectives to their work.

They seek out specialized support that maps to these micro-identities and are quick to look elsewhere if they don't feel included or represented.

# In not clarifying who you're for and how you support them, you risk leaving everyone on the outside looking in.

#### **Professional**



**Dental employees** feel like the ADA exhibits favoritism towards private practice owners (especially acute during COVID).



**Public health specialists** feel like the ADA doesn't support their career choice by not providing financial assistance and discounted CE.



**Female dentists** have experiences in state and local chapters of the ADA that make them feel excluded from the "boys club".



**Racially diverse dentists** don't see other members who look like them, which signals that the ADA has no reason to care about them.



#### The ADA's Core Values

The Core Precepts are the mission and values for the employees of the American Dental Association in their support of the dental profession and the public

Commitment to Members

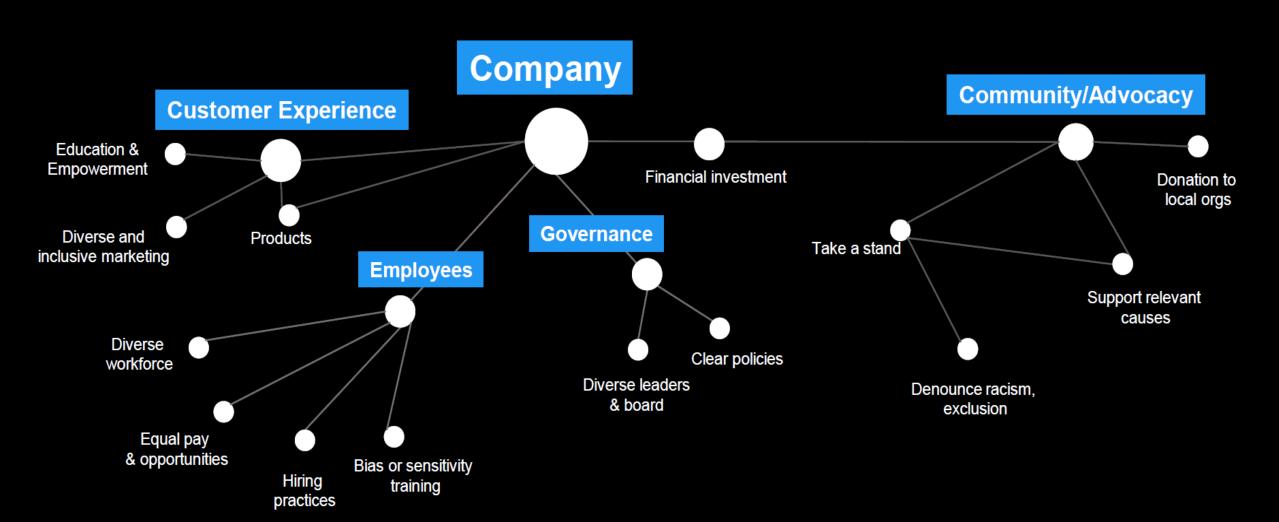
**Integrity** 

**Excellence** 

Science/Evidenced Based Resources



# How do you know a company is being authentic in its diversity and inclusion efforts?



#### Commitment to the Improvement of Oral Health

# Is the ADA leading?

#### Early Career New VALUES Development Strategy & Implementation

What they've told us they want:

## Oral Health Advancement

- Resources and support for dentists and their varying patient populations
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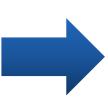
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#### ADA Board of Trustees Supports New Value/Values Focus

B-9-2022. Resolved, that in order to advance new opportunities for member growth, the Board supports staff prioritizing the following two key opportunities:



Improve the alignment of ADA's overall portfolio mix of programs, products, services and resources to meet the needs of dental students and new dentists (particularly in their first 1-3 years out of school) and the inherent diversity within them.



Accelerate Tripartite alignment across these three ADA core values:
1) commitment to improving oral health 2) diversity and 3) inclusion with an emphasis on inclusivity for all dentists across all practice modalities.

#### The Transformation of Value and Values

# How will you and your respective dental society champion change?

#### White Board Activity

#### **Driving Change Together**

1. How to Be a Change Hero

- 5. Driving Digital Innovation
- 2. The Future of Oral Health in America
- 6. Value / Values in Advocacy
- 3. Value / Values in Membership
- 7. Governance Topics

4. New Dentist Panel



2022 ADA State Presidents-Elect Conference

#### White Board Activity

Question: How can you take everything you've learned at this conference and use it to create true, impactful solutions in your state?

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- As the President-Elect, what actions can you take to be the change here to promote, implement and enhance the value?



# ADA Presidents-Elect Conference

Presented By:



ADA American Dental Association®



#### Value and Values: Navigating the Generational Demographic Membership Shift



**Dr. Brad Barnes**Chair
ADPAC



Dr. Giorgio Di Vincenzo
Chair-Elect
ADPAC



#### ONE VOICE UNITED

President-Elect's Conference





#### What is ADPAC?

- American Dental Political Action Committee
- Raise funds from ADA member dentists and students for collective political action
- Focuses on issues of concern to dentists, and their patients, practice, and profession
- Bipartisan; together, we are all members of the "Tooth Party"







#### What does ADPAC do?

Raise money

Distribute contributions

Grassroots advocacy

Political education





# ADPAC is the political arm of the American Dental Association

#### Raise Money

- Raise about \$1.7 million/year
- Funding directly from dentists and students
- Raise funds for the ADA House on the Hill
- 75% of contributions are \$50 or less
- Club levels for dentists, spouses, students, and New Dentists
- Lifetime Giving level

#### Distribute \$

- Given \$2.1M in 2020 cycle
- Monitor 435 House races and 34 Senate races
- Assist dentists running for Congress
- Increase visibility and access for the ADA on Capitol Hill
- Ensure dentists are credited for contributions locally
- Host events for members of Congress on Capitol Hill

#### Grassroots

- Create advocacy site to •
  help dentists
  communicate with
  MOCs
- Provide assistance to states on grassroots efforts
- Build action teams/key contacts for every legislator
- Dentist and Student Lobby Day
- Action Alerts
- Digital communications to legislators and staff

#### Political Ed

- Dentist and Physician Campaign SchoolVoter drive to increase
- dentists registered to vote

  Get Out the Vote
- Lunch and Learns at ASDA Chapters





#### States and ADPAC

#### Compliance

- Going paperless/digital
- Can provide legal advice
- State PAC Conference during Lobby Day

#### **Grassroots**

- Campaign School
- ADA Dentist and Student Lobby Day-March 5-7, 2023 (in-person)





### We need your help- give to ADPAC

- \$1,000 Diamond, \$500 Capital Elite, \$250 Capital Club and more!
- Text ADPAC to 345345







#### Upcoming events

#### 2022

- July 29-31- ADPAC Summer Meeting
- October 16- Event for Rep. Brian Babin, DDS- Houston
- October 17- Diamond Club Reception- Houston
- November 8- Election Day

#### 2023

March 5-7- ADA Dentist and Student Lobby Day





#### Thank you!

- ✓ Sign up for Action Alerts at ADA.org/ADVOCACY
- ✓ Attend ADA Dentist and Student Lobby Day
- ✓ Join ADPAC at the Diamond Level
- ✓ Listen to Tooth Talk
- **✓** VOTE





#### Contact information

Dr. Brad Barnes, Chair Dr.BradBarnes@gmail.com 309.830.6636

Dr. Giorgio Di Vincenzo, Chair-Elect gtd986@aol.com 201.486.2069

Sarah Milligan, Director milligans@ada.org 202.277.1280



# Enjoy Your Lunch!

Optional tour of the building will begin at

12:15 pm

(meet at the registration desk)

The next session begins at

12:45 pm

# Thank you to our Sponsors



ADA American Dental Association®



# Panel Session: DSO-Supported New Dentists



Dr. Seth Walbridge Moderator & Chair New Dentist Committee, ADA



**Dr. ArNelle Wright**Panelist



**Dr. Mithila Sharma**Panelist



Dr. Alexander Smith
Panelist

#### White Board Activity

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### **Driving Digital Innovation at the ADA**



Stephanie Moritz
Chief Marketing & Communications Officer,
ADA



Jordan Baugh
Chief Technology Officer
ADA



### CO-CREATION SESSION #1 - May 4, 2022

- 10 Early Career Dentists –
   D3 to Y3
- Inclusive of students, gender, ethnicity and practice modalities (private to DSO practice)
- 90 minutes of innovation and creation exercises
- 5 problem and need territories
- 5 solutions/ideas created



#### MEET OUR EARLY CAREER CO-CREATORS

Jenna Chun – 3<sup>rd</sup> Year Student, Richmond Virginia

Zane Keller – 4<sup>th</sup> Year Student, Kansas City, Missouri

Pooja Yarlagadda – 1<sup>st</sup> Year in a Mid/Large Practice, working in Detroit, Mi

**Graham Naasz** – 2<sup>nd</sup> Year in Small/Solo Practice, Kansas City, Missouri

Prejith Varghese – 3<sup>rd</sup> Year in a Mid/Large Practice, working in Oklahoma

Laura Watterson – 2<sup>nd</sup> Year in a Small/Solo practice, working in San Diego, California

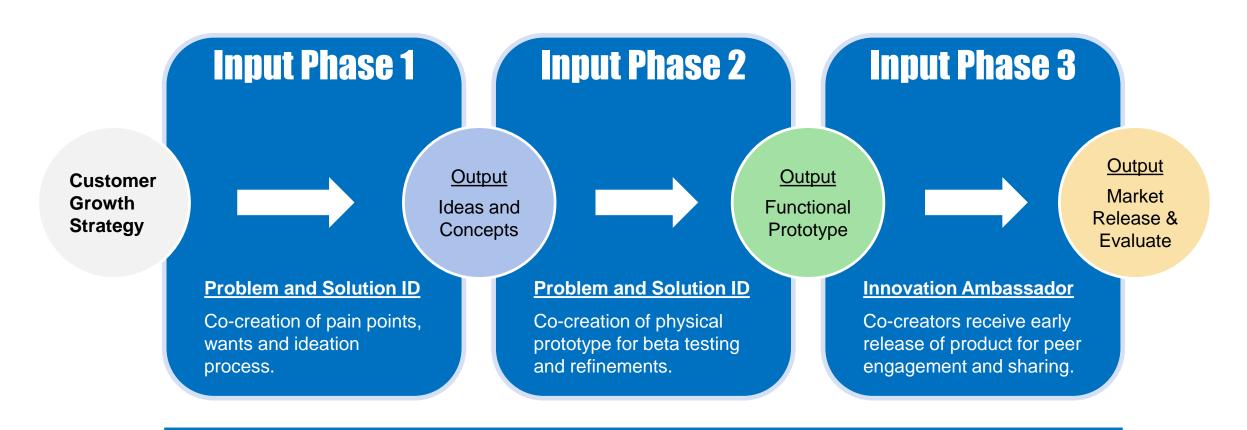
Gretchen Kreklow – 2<sup>nd</sup> Year and Practice Owner working in rural Minnesota

**Anne Charlie** – 2<sup>nd</sup> Year in a Mid/Large Practice, working in Texas

Alaina Kelly – 3<sup>rd</sup> Year Associate Employee in a dentist-owned practice

Kirthi Tata – 3<sup>rd</sup> Year in a Mid/Large Practice working in Oklahoma

#### **NEW CO-CREATION PROCESS**



Innovation Pathway

**Desirability** 

Customer Need and Want

**Feasibility** 

Operational fidelity

**Viability** 

Business sustainability

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#### **OUR CO-CREATED VALUE PROPOSITION**

The primary value an ADA App can provide is to provide the **confidence and security** to those new to the profession ensuring the right decisions in patient care and personal finance.

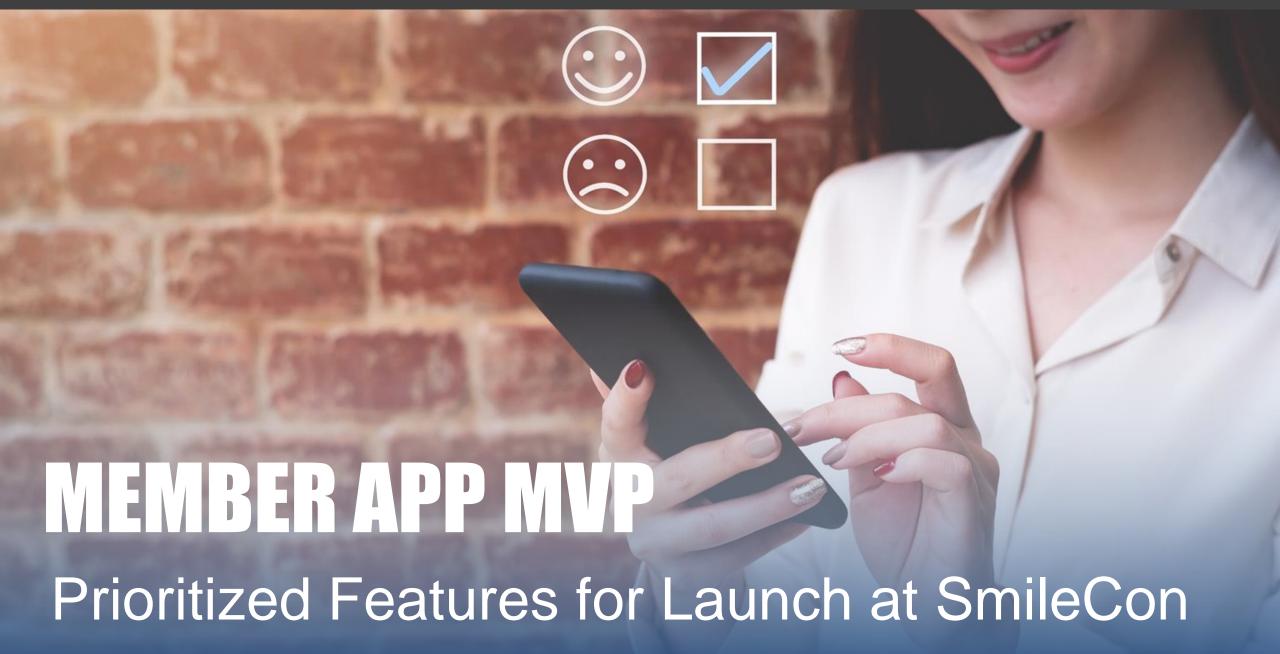


#### THE ONE THING WE NEED TO KNOW

Early Career Dentists want an ADA App to fill the gap.

### FEATURE FOCUS SUMMARY: WHAT THEY NEED AND WANT

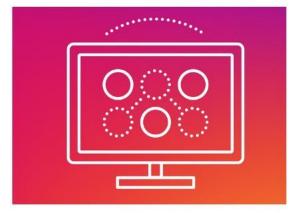
EC Problem Territories	They Would Like to Have	Co-Created Innovation
1. Keeping Track	Vital Documents Vault	Comprehensive CE Tracker, Affordable CE Offers
Clinical Expert, But Inexperienced     Business Person	Mentor and Quick Access to Answers	Business/Practice Management Resources/Tool Kit, Financial Boot Camp, i.e. White Coat Investor
3. Tough to Find the Right Fit	Guidance on How to make Smart Career Choices.	Mentor/Career Coach/Advice, Practice Modality Career Quiz
4. Lack of Real-Time Resources	Chat Forum for Professional Advice and Fun (i.e. Virtual Happy Hour)	On-Demand Ask-a-Specialist, Revive Oral Pathology App – fold in
5. Financial Fears	Referrals for Resources and Learning the Business of the Business	Debt and Financial Planning Planner



## RECOMMENDED FEATURES

Prioritized by Co-Creation Group

### PRIORITIZED RECOMMENDED FEATURES



**Personalized Content** 



**Career Pathways** 



**Community Connections** 



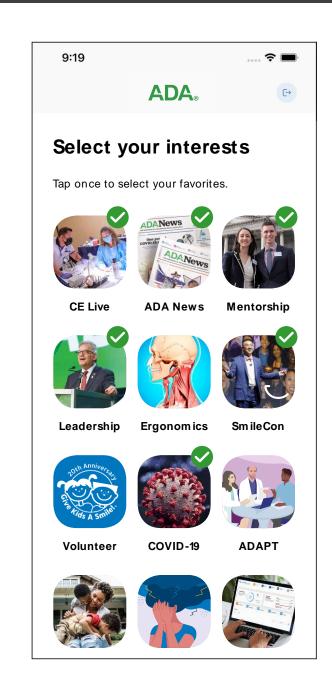
**Document Vault** 



**ADA Podcast** 

# PERSONALIZED CONTENT EXPERIENCE

- Self-select topics of interest for a feed of content tailored to their preferences
- Able to change topic preferences, or add more at any time
- Sourced from ADA sites

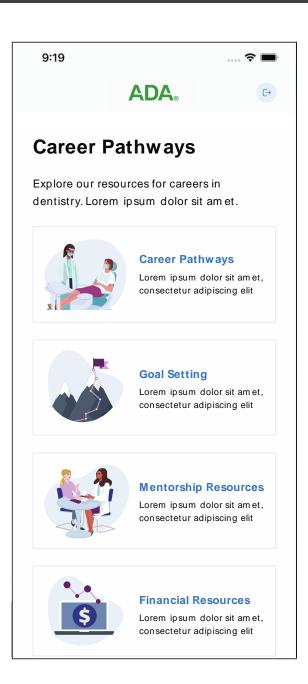


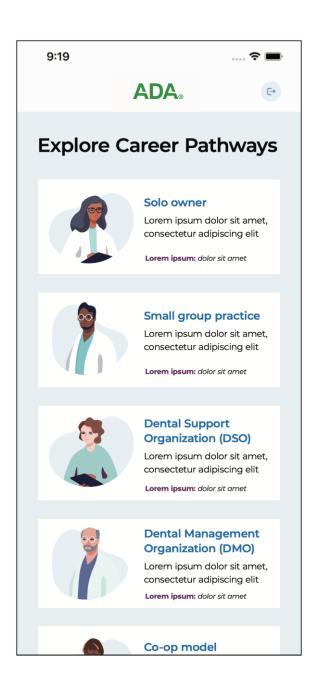


#### **CAREER PATHWAYS EXPERIENCE**

- Unique gap we can fill!
- Addresses need to learn more about the wide variety of career paths available post graduation.
- Creates engagement, membership and new partnership/sponsorship non-dues opportunities.
- Users will select from dental career options to explore content that illuminates aspects of different practice types and other career paths.
- Phase 2 (post MVP) will deliver a pathways self-assessment tool to help students understand their personal preferences.



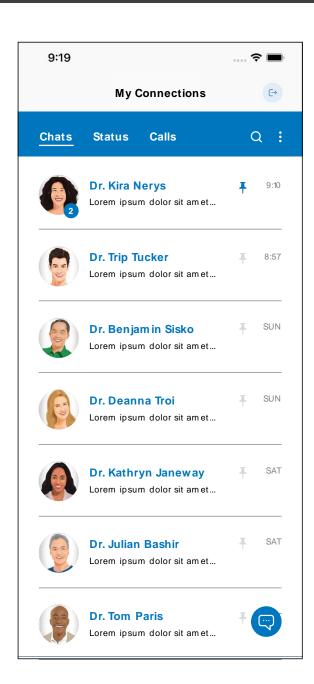


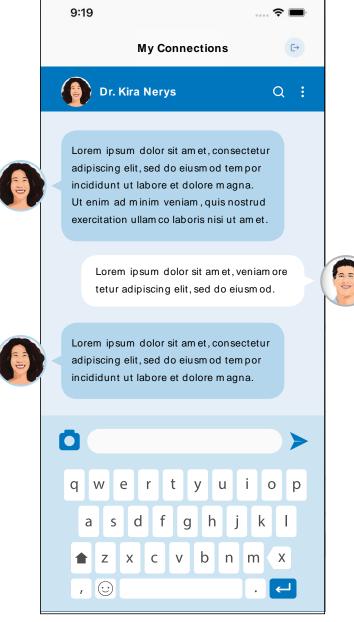




## COMMUNITY CONNECTIONS – MESSAGING

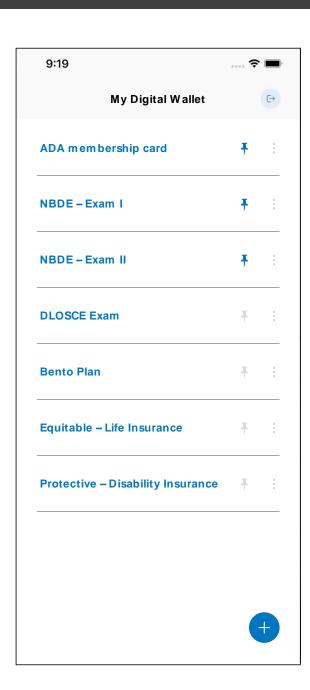
- Fills a need to connect with each other for quick support on practice, clinical and personal topics – in an easy way
- Connect via searching the Member Directory to create 1:1 or small group chats to serve their immediate needs
- Opportunity to create selfidentified groups with real-time messaging & engagement

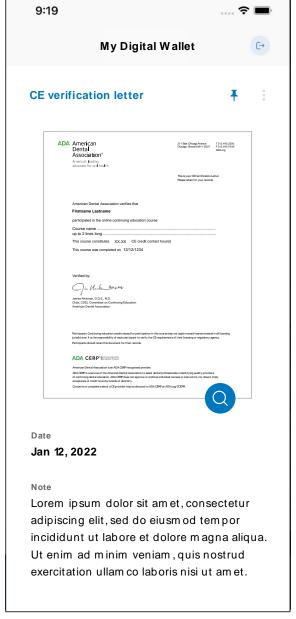




## DIGITAL WALLET DOCUMENT VAULT

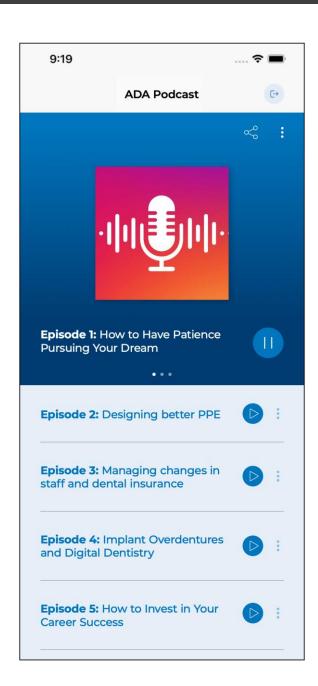
- A unique gap we can fill!
- Need to keep a variety of documents on hand for attesting for credentialing and licensure renewal.
- Want a place to keep all of priority docs for easy accessing and sending.
- Utilizes native security features, documents saved locally to each user's phone, not within ADA systems.





#### **ADA PODCAST**

- New way to engage!
- Listeners gain desired expert and entertaining experience and advice.
- Features inaugural and future seasonal releases with fresh and current content.
- Entertaining, fun and informative.
- Undergoing co-creation with early career dentists.





### **SPONSORSHIP & MONETIZATION OPPORTUNITIES TO COME**

- We will be working with the Business Group to identify new opportunities for revenue that align with the core needs of the early career dentist groups. Ideas could include:
  - Sponsored content around topics of focus finance, business, practice management
  - Limited time offers and deals revealed via customer targeting
  - Webinars / Whitepapers for lead generation opportunities
  - Products and services crafted for this audience
  - Existing services offered through ADA and ADABEI that deliver on solving problems for this career stage

# UPCOMING SPRINTS & FUTURE POTENTIAL WITH SALESFORCE

#### **UPCOMING SPRINT EFFORTS**

- Headless content integration to enable personalized content feeds
- User Experience design for member interaction and new features
- My Connections messaging prototype for co-creation feedback
- Develop privacy policy and terms of use with legal team

- Content development for career pathways features by Early Career Workgroup
- Reviewing Application currently being used by ADAPT
- Merchandising what's coming – "app on a page" and dean/student engagement tool with QR code signup for Early Career Advisory Panel

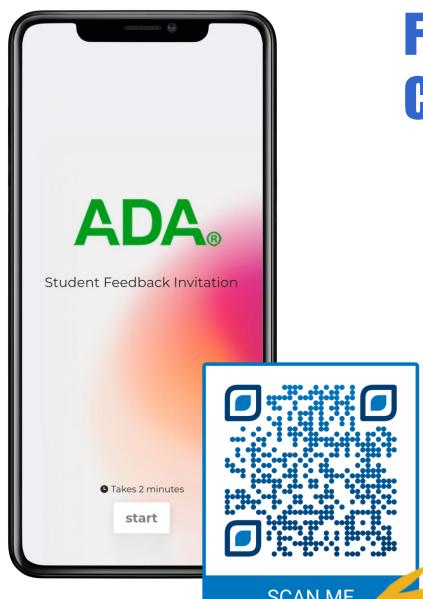
#### THE FUTURE IS SALESFORCE

- Mobile Publisher for Experience Cloud —
  use for quick custom branded mobile app development
- salesforce
- Access to Salesforce App Exchange thousands of ready-to-install third party apps, and customizable components, templates, automation processes and data solutions
- Rapid Development using Lightning UI component library
- Tight integration with the underlying Salesforce CRM data
- Simple authentication standard across all systems (SAML)

# ADA MEMBER APP PROMOTIONAL LAUNCH

#### **PARTNERING TOGETHER**

- How can we best educate members and non-members together?
- How can we best partner to educate, promote and invite others in as we continue to develop, build and address pain points?
- What opportunities would you like to explore in the future?



## FACULTY/STUDENTS AT THE **CENTER OF ITERATING**

- Would you like to sign up to receive an early release of the ADA Member App and provide feedback?
- Would you be interested in participating in an ADA Student **Advisory Panel?**

Interested in participating? Scan the QR code and fill out our quick form.

SCAN ME

	<b>Business Objective</b>	Drive app adoption that results in 100% downloads among early career member dentists (~20% of all members)
egy	<b>Marketing Objective</b>	Create awareness among early career dentists to drive downloads, gain loyalty and build long-term engagement
Strategy	Marketing Approach	Bring to life the vibrant, personalized member experience in the new My ADA Member App through a major, broad-reaching campaign timed to launch at SmileCon
Promotional (	Reasons to Download (RTD)	<ul> <li>Co-Created, Confidence, Community, Ease</li> <li>Co-created by ADA Member dentists for member dentists</li> <li>Explore career path options</li> <li>Learn from the experts — tune into educational podcasts with weekly releases &amp; CE "sound bites" playlist</li> <li>Tap into a community of peers for advice, networking</li> <li>Access personal and professional financial resources</li> <li>Have all documents and credentials at your fingertips, in one place and secure</li> </ul>
	KPIs	Visits to landing page; % Overall member downloads; % of EC downloads; Reach, impressions

Create Excitement Sep 5 - Oct 12

Oct 13 - Oct 20

Build Engagement Oct 21 and beyond

Introduce, educate, excite

Use full force of member channels, promote incentives

Continue to drive downloads while layering in retention/engagement with app updates and incentives

Continuous co-created app releases, Rolling limited-time incentives

#### ADA MEMBER APP LAUNCH — CONTENT BLUEPRINT

#### **Primary Message:**

The My ADA Member app is a personal portal to your ADA life, co-created for members, by members

#### **Overall Benefit of Value and Values**

Co-created

by our

community

#### **All Members**

Target Benefit: Easily manage my ADA member experience in the palm of my hand.

#### RTD Motivators:

- Connection

#### **Early Career**

Target Benefit: An app that gives me immediate access to info that helps me be successful.

Ease of use

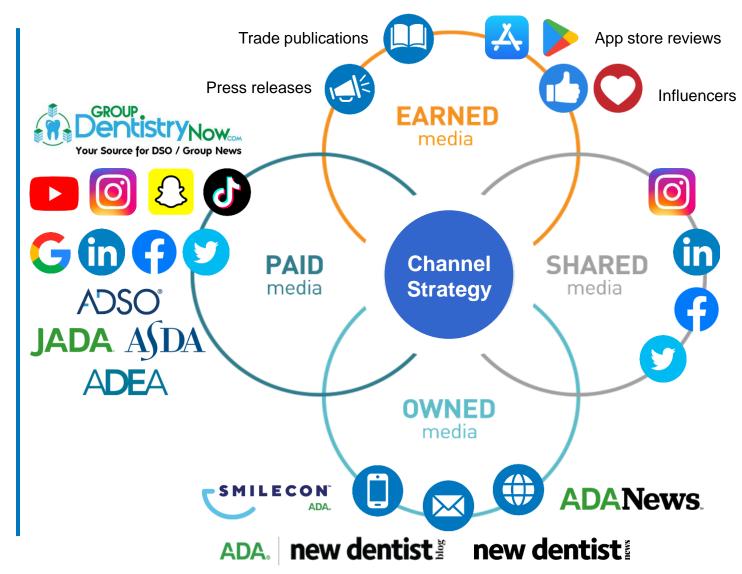
#### RTD Motivators:

- Confidence
- Ease of use
- Connection

## **ADA MEMBER APP LAUNCH – ACTIVATION BLUEPRINT**

#### **Primary Execution:**

Incentivized takeover campaign of all owned and high-profile channels to reach ADA members at launch

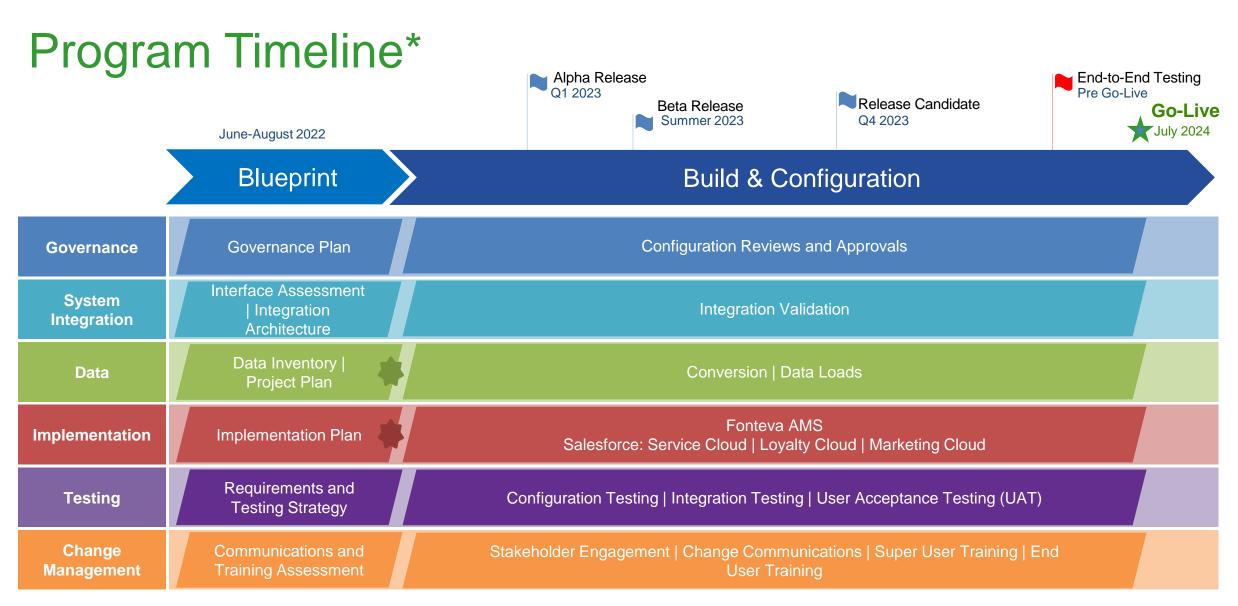


# AMS/CRM Program Update

July 18, 2022

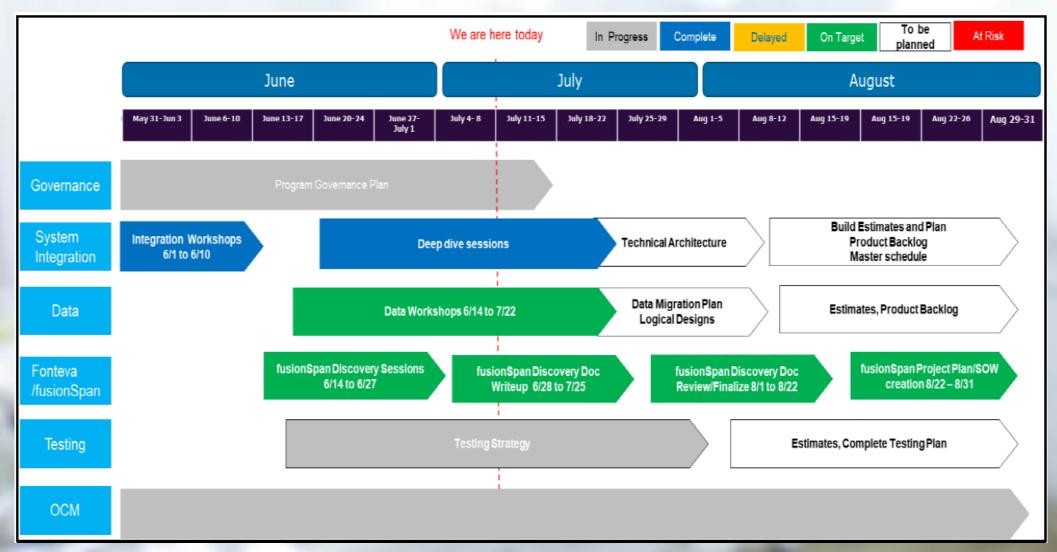
## AMS/CRM Program Objectives

- Configure and implement Salesforce and Fonteva with few customizations to provide a single solution to the Tripartite
- Smoothly transition to new business processes through engagement, user onboarding and training support
- Leverage CRM functionality to enhance the service, support, commerce, collaboration and communication capabilities for ADA workforce and members



<sup>\*</sup>Draft timeline subject to change
Each workstream will be executed using Agile Scrum Methodology

#### Current Status - On time



#### Stakeholder Advisory Committee

Stakeholder Advisory	Committee Members
Joshua Braswell	FL
Rachael Daigle	TX
Shelly Dates	NC
Mary Donlin	PA
Marcy Dwyer	Detroit
Stacey Hemmel	MO
Dr. Andy Kwasny	PA
Eric Larson	IL
Jody Marquardt	MI
Scott Piper	GA
Megan Stagina	St. Louis
Kainoa Trotter	WA
Grazia Yaeger	NY

#### **Committee Role/Purpose**

- Provide program advocacy, input, support and transparency
- Understand State and Local needs to increase organizational capacity
- Secure buy-in to assist Tripartite implementation

#### **Activity/Engagement to Date**

- Active participation in AMS vendor demos
- Demo feedback helped inform Fonteva selection
- Participated in fusionSPAN discovery interviews and providing feedback (in-process)

## Risks and Mitigations

Risks	Mitigations
<ul> <li>State willingness to move</li> <li>Customizing versus standardizing</li> <li>Concerns with the timeline</li> <li>Concerns with included tools</li> </ul>	<ul> <li>Get state acceptance through Change Management and value</li> <li>Understand reason for customization and provide sustainable solutions</li> <li>Use Stakeholder Committee and other meetings to get buy in from states</li> <li>Identify new features that provide significant value</li> <li>Sell the tripartite on the network benefits of having shared information</li> </ul>
<ul> <li>Cutover complexity</li> <li>Amount of functionality available at launch</li> <li>Compressed training timeframe</li> <li>Vendor migration</li> <li>SSO migration</li> </ul>	<ul> <li>Manage release through multiple modalities</li> <li>Rigorous testing of various use cases</li> <li>Train the Trainer to have a large training capacity</li> <li>Super users as knowledgeable users throughout the tripartite</li> <li>Regionally focused training plans (TBD)</li> </ul>
<ul> <li>Data Migration</li> <li>Data loss or corruption</li> <li>Data migration and cleanup need to be handled in a compressed timeframe</li> </ul>	<ul> <li>Thorough testing protocols</li> <li>Implement comprehensive testing and run through the migration process multiple times to ensure production readiness</li> </ul>
<ul> <li>Release Timing</li> <li>Finding a release window that does not impact Annual Meeting or Dues Processing</li> </ul>	<ul> <li>Agile process to identify necessary features for cutover</li> <li>Track and prioritize highest need functionality to be able to go live</li> <li>Understand what can be done later if a go-no go decision is required</li> </ul>

## White Board Activity

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## Networking Break

#### Thank you to our Sponsors



ADA American Dental Association®



## Value and Values: Success in the Advocacy Arena



Jane Grover, DDS MPH
Senior Director, ADA Council on
Advocacy for Access and Prevention



Michael A. Graham
Senior Vice President
ADA Government and Public Affairs



Chad Olson
Director, ADA Department of
State Government Affairs

## Value and Values: How State Dental Societies and ADA Work Hand-in-Hand

Chad Olson
Director, State Government Affairs, ADA



## Where the Tripartite is Collaborating:

- Dental Insurance Reform
- Medicaid
- Workforce Challenges
- Modernization of Dental Licensure

## State Public Affairs Program

- Two grant cycles every year
- Group of dentists (Oversight Workgroup) evaluates grant applications
- Focuses on advancing state society objectives that align with ADA policy
- Making a difference DIR 11 new laws in 5 states

## What's Next: 2022 and Beyond

- NCOIL
- Massachusetts Ballot Initiative
- ERISA

#### **Questions or comments?**

Chad Olson olsonc@ada.org (630) 408-6558

## Values of Public Facing Programs Making the Business Case for Doing Good







Dr. Jane Grover
Senior Director, Council on Advocacy for Access and
Prevention

#### Potential Outcomes of Public / Private Partnering for HE

- Doing Good "Does You Good"
   "Giving Back" "Retiring" Stress Reduction / Wellness
- Mentoring Potential Dentists From All Populations
   Medicaid Providers Change System From The "Inside"
- Expands Access to Care and Prevention of Disease
   Age One Dental Visits Oral Health Integration

#### How ED Referral Programs Can Work

- Medical (ED) and Dental Collaboration to Identify the Issue
- Non-Profit Agency Becomes Involved

- Steering Committee Engages Community Stakeholders
- Positive Social and Media Attention

## Community Dental Health Coordinator Program

- No Change to a State Practice Act
- Gathers and Navigates New Patients
- Online program Certificate of Completion -- Over 800 grads
- New Schools an FQHC a Dental School and the IHS

Case Management Codes Billable in Many States

# Health Equity Action Plan = The "Value" of "Values"

### **HEAT**

**Engage Grassroots Dental Leaders** 

Connect Providers
Small Steps
Local Media

### **Future Dental Professionals**

**Event Assists** 

Involve Stakeholders and Small Business Communities / Non-Profits / Faith Based

**Expanded Access** 

**Publics and Privates Working Together** 

The Voice of the Patient --The Ear of the Legislators – the Eyes of the Media

# What Does Health Equity Look Like in the Dental World?

- Lowering Barriers to Care:
   Medicaid Reforms Health Literacy
   CDHC Dental Case Management / Navigation
- Promoting Dental Careers For Underrepresented Populations SAID / NDA Annual Meetings and Student Engagement "Lessons In A Lunchbox" for middle school students
- Dental Homes Through CDHC and Medical-Dental Collaboration
   More patients get actively linked to care private and public

## **Current CAAP Medicaid Actions**

- Readiness for Public Practice Guide for New Dentists
- MPAC Boot Camps for States and Dental Schools
- Awareness Program Integrity and Compliance



Questions?

Comments?

Words of Wisdom?

# THANK YOU

# White Board Activity

### **Driving Change Together**

1. How to Be a Change Hero

- 5. Driving Digital Innovation
- 2. The Future of Oral Health in America
- 6. Value / Values in Advocacy
- 3. Value / Values in Membership
- 7. Governance Topics

4. New Dentist Panel





2022 ADA State Presidents-Elect Conference

#### White Board Activity

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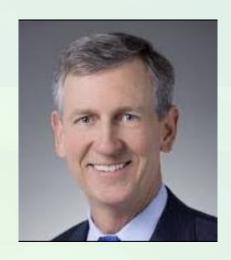
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- 2. As the President-Elect, what actions can you take to be the change hero to promote, implement and enhance the value?



# **Leadership and Governance**



Scott Fowkes
General Counsel
ADA



Wendy Wils
Deputy General Counsel
ADA



# Our main topics today...

Working with staff The basics of good Working with the **Discussion Board and HOD** governance

# **GOVERNANCE OVERVIEW:**

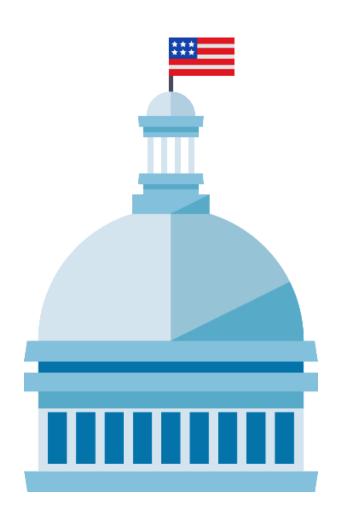
What is Governance?



# Working with Staff: Governance vs. Management



### Governance is ....



Well-informed decision-making on behalf of the organization, its members, and the public interests.

The process of **governing** (not managing)

The judicious exercise of power or authority

Providing direction to those who engage in management

### Governance is ....

- Providing strategic leadership
- Crafting policy
- Setting the direction
- Overseeing health of the organization
- Defining, deliberating and deciding on matters vital to the organization
- Advancing the mission of the organization



### Adherence to Core Values

"It's not hard to make decisions once you know what your values are."

Roy E. Disney



# Ten Basic Responsibilities of Non Profit Boards

Determine:
Vision
Mission
Purpose
Core Values

- 2 Select CEO/Executive Director
- Support and Evaluate CEO/Executive Director

Plan Effectively

- Strategic
- MeasurableOutcomes

- Programs& Services
  - Monitor
  - Strengthen

# Ten Basic Responsibilities of Non Profit Boards

Ensure Adequate Financial Resources

Protect Assets,
Provide Longterm Financial
Oversight

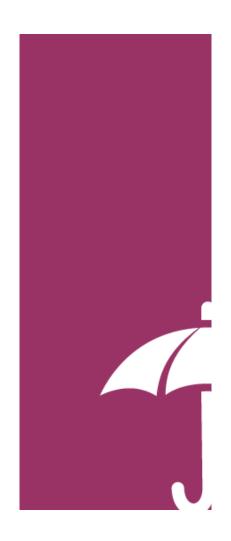
Build and Maintain a Competent Board

Self-evaluation

- **Ensure**Integrity
  - Legal
  - Ethical

10 Enhance
Reputation
of the
Organization

# Enterprise Risk Management



- Responsibility of board and management
- Risk tolerance/appetite
  - External Environment
  - Internal Capacity and Capability
  - Policies and Procedures Related to Execution of the Plan
  - Desired Growth or Return on Investment
  - Culture

# Why This Matters?



The greater the complexity of an organization, the more important process and governance become.

# What is a Fiduciary Role?

### **Tangible Assets**

- Money
- People
- Real Estate
- Reputation (Goodwill has economic value)

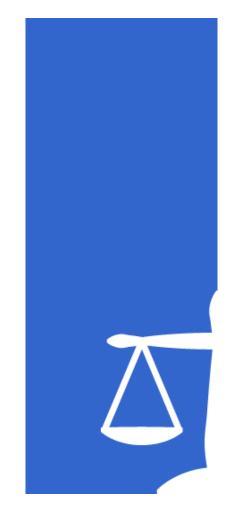
### **Duties**

- Duty of Care
- Duty of Loyalty
- Duty of Obedience

### **Legal Aspects**

- Indemnified against personal liability through Director and Officer Insurance
- Not protected from AG or IRS violations if illegal acts are committed

# Legal Responsibilities



- Legal representatives of organization
- Legal duties and obligations
  - Imposed by law
- Risk of legal exposure to organization if duties improperly carried out
  - Distracts from mission
- Awareness of legal risks and issues

# What Are Your Legal Governance Duties?

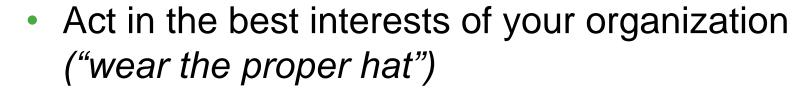
### **Duty of Care**

- Exercise "prudent business judgment"
- Prepare, attend, participate, make informed decisions, exercise independent thought
- You may rely upon staff or committees unless privy to better/more information



# What Are Your Legal Governance Duties?

### **Duty of Loyalty**



- Identify, disclose and address any conflict of interest
- Maintain confidentiality ("what happens in Vegas, stays in Vegas")



# What Are Your Legal Governance Duties?

# **Duty of Obedience**

- Be consistent with the articulated mission of the association
- Know and follow the bylaws and governing authority for conducting the organization's activities



# GOVERNANCE & MANAGEMENT



## Who does what?

The **who**, **what and when** – the direction and goals – are the province of the leadership.

The **how** – the means of achieving the stated goals – is the job of the staff.



# Who is Management?



## **Executive Director**

The person who has ultimate responsibility for implementing the decisions of the governing body.

Handles the allocation of resources and oversight of the day-to-day operations of the organization

# Leadership and Staff Commitments

### Staff

- Provides sufficient information for effective decision-making by volunteers
- Facilitates fair and effective volunteer debate (with Chair)

### **Staff & Leadership**

- Collaborate on wellwritten, unambiguous resolutions
- Have mutual respect
- Have candid, honest conversations, especially when conflict arises

### Leadership

 Provides clear, reasonable direction to staff

# Effective Partnership: Leaders and Staff



- Support for management with healthy skepticism
- Praise in public, punish in private
- Staff provides critical resources:
  - Pros/cons
  - Data
  - Financial impact
  - Knowledge
  - Time and talent

## Role of the Board Chair



- Ensure alignment with the mission, strategic plan and core values
- Facilitate Board's work and effectiveness
- Make appointments per bylaws and rules
- Collaborate with ED to set Board's agenda
- Manage conflict within Board or between Board and staff
- Facilitate debate without entering debate

## Ineffective Governance: "In the Weeds"



- Too much attention to detail, minutiae
- Ineffective delegation of work
- Inability to see the big picture
- Lack of trust regarding implementation or execution
- Operational focus, rather than strategic focus
- Intrusion on responsibility of day-to-day management and work of staff, committees, administration

## What Can Lead to Ineffective Governance?



- Role confusion
- Focus on short-term management instead of long-term strategic issues
- Managing small business rather than governing and taking on larger issues
- Poor agenda management
- Desire for immediate results over long-term strategic outcomes

## Final note...









# **Driving Change Through Governance**



Raymond A. Cohlmia, DDS

Executive Director

ADA



Ron Lemmo, DDS

Strategic Forecasting Task Force Chair

ADA

# A NEW DAY: EVOLVING GOVERNANCE AT THE ADA

Dr. Ron Lemmo Chair, ADA Strategic Forecasting Task Force

Dr. Raymond Cohlmia Executive Director, ADA

July 2022

# **ADA's Current Model of Strategic Planning**

### Start Point Year 0

What Are Our Current Issues and Problems?

### **Years 1-5**

Define Process and Strategy on How to Fix the Issues

### Year 5

Evaluate Where We Are On Our Issues

Start The Next Plan Based On What We Didn't Get Fixed and Our Current New Problems

# Strategic Forecasting is Substantially Different

Where Do We Want To Be In Five Years?

Establishing, Defining, and Engaging The Necessary Means to Achieve the Five Year Goal

Constant Evaluation of the Five Year Outlook and Current Environmental Trends and Modes

Evaluated And Changed On
A Yearly Basis And
Continually Evaluates/
Changes To The Five-Year
Outlook

### In Strategic Planning...

The ADA sets major goals with a five-year timeline based on the state of the Association at the time.

"Based on where we are today, this is where we need to be in five years."

### In Strategic Forecasting...

The House of Delegates will determine the ADA's strategic forecast and vote annually to modify it based on member needs that have emerged during the year.

"This is where we need to be in five years, regardless of where we are now. Let's do what we need to do to get there."

### In Strategic Planning...

The ADA works toward the goals, monitors progress, and evaluates results at the end of the five-year term.

"Let's set our five-year plan, and in five years, we'll see how we did."

### In Strategic Forecasting...

The ADA adapts to what's happening while progressing toward important targets.

"Our situation has changed. Let's find a way to adapt now so we can still hit our five-year goal."

### In Strategic Planning...

The strategic plan is set, with no flexibility to adapt for circumstances that could change at any point in five years.

"We're driving using our rearview mirror and moving forward based on what's behind us."

### In Strategic Forecasting...

The ADA assesses its environment and adapts its strategy based on current circumstances—not those of the past.

"What's ahead of us is more important than what's behind us. Let's keep looking through the windshield."

### **Strategic Forecasting Committee Composition**

### Strategic Forecasting Committee Members

- 8 HOD Members (Voting)
- 4 Trustees (Voting)
- 1 New Dentist Member (Voting)
- President (Non-voting)
- President-Elect (Non-voting)
- Treasurer (Non-voting)
- Executive Director (Non-voting)

Strategic Initiatives Subcommittees
4 HOD SFC Members, 2 BOT SFC
Members, P, PE, Treasurer, ED
consultants / with authority to attend

#### **Action Groups from NEWS Format**

Action Groups makeup varies with: ADA HOD Members, Academia, New

Dentist, ASDA, EDs from

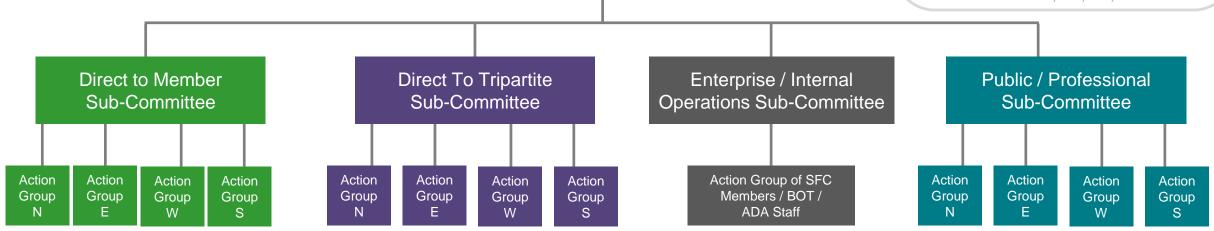
Components/Constituents, Dental Industry, DSO Admin

North: Districts 6, 7, 8, 9

East: Districts 1, 2, 3, 4, 16

West: Districts 10, 11, 13, 14

South: Districts 5, 12, 15, 17



## **QUESTIONS?**

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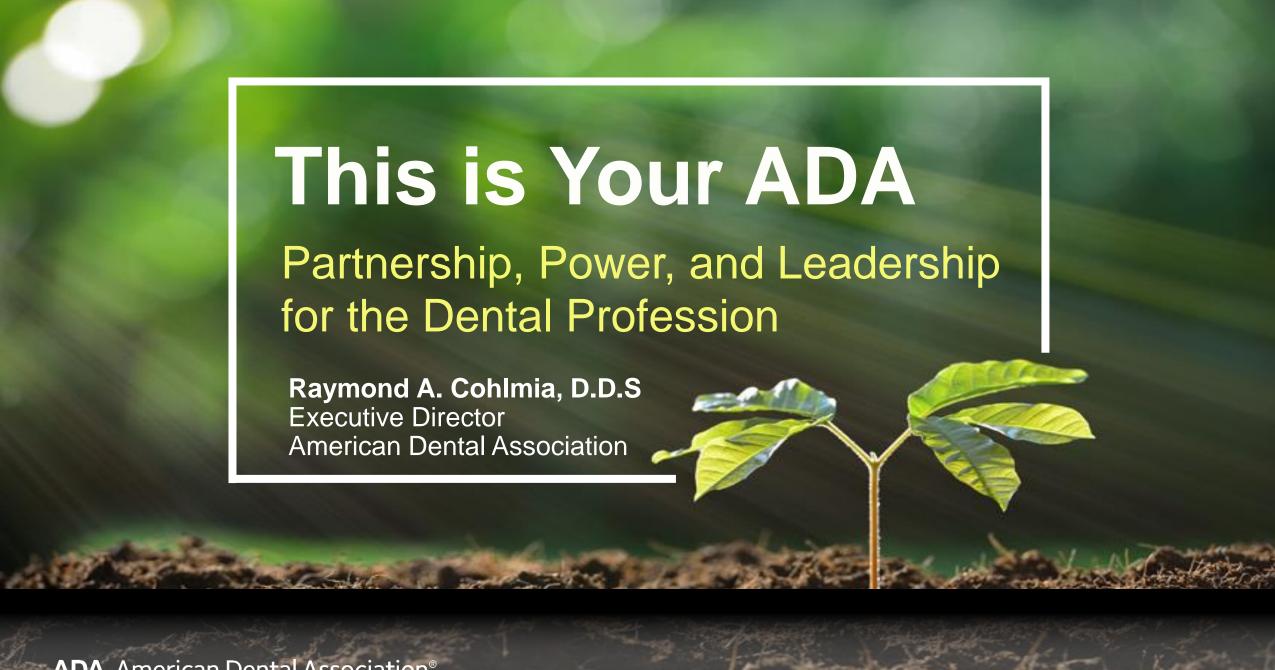
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### This is Your ADA

Raymond A Cohlmia
Executive Director, ADA

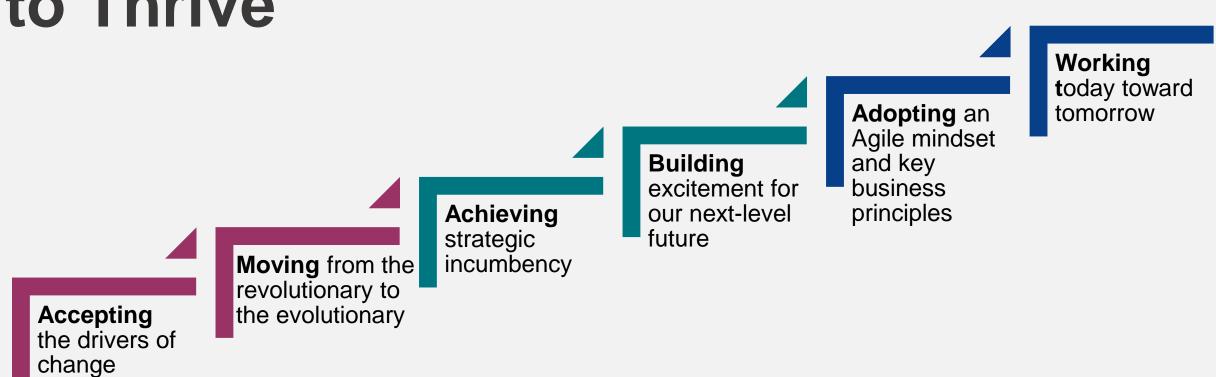




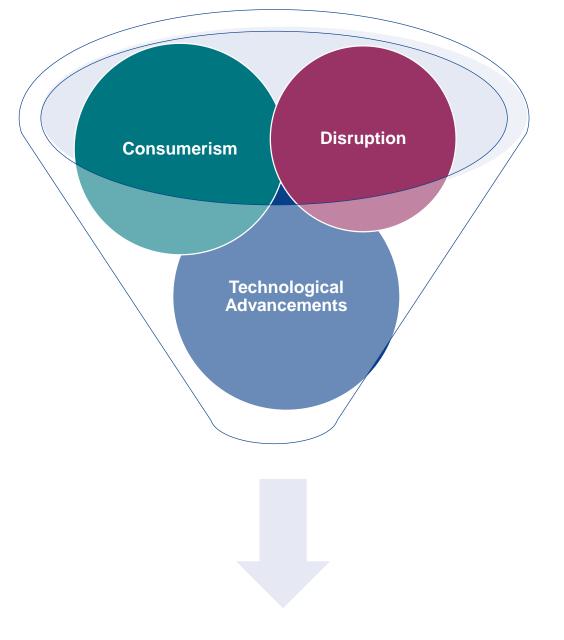
### Our Partnership, Our Power



# What It Takes to Thrive



# Accepting the Drivers of Change



**Shaping 21st Century Health Care** 

# Moving From the Revolutionary to the Evolutionary

Traditions can be fatal:
 Once-beloved brands (like Blockbuster Video, Kodak, and Oldsmobile) embraced their traditions, missed paradigm shifts, and filed bankruptcy or went out of business.

 The ADA has the opportunity for evolutionary change.



# Achieving Strategic Incumbency

#### **Strategic Incumbency:**

"An established firm's ability to dynamically convert **age**, **size**, and **tradition** into the key advantages of **market power**, trusted **relationships**, and deep **insights**."

Harvard Business Review



# **Building Excitement for Our Next-Level Future**

To reach our next-level future, we must...

- Define what it looks like
- Identify opportunities when they arise
- Find ways to get there



Adopting An Agile Mindset and Key Business Principles

- Customer focus
- Global presence
- Sustainability
- Innovation
- Nimbleness



# Working Today Toward Tomorrow

"What got us here... won't get us there."









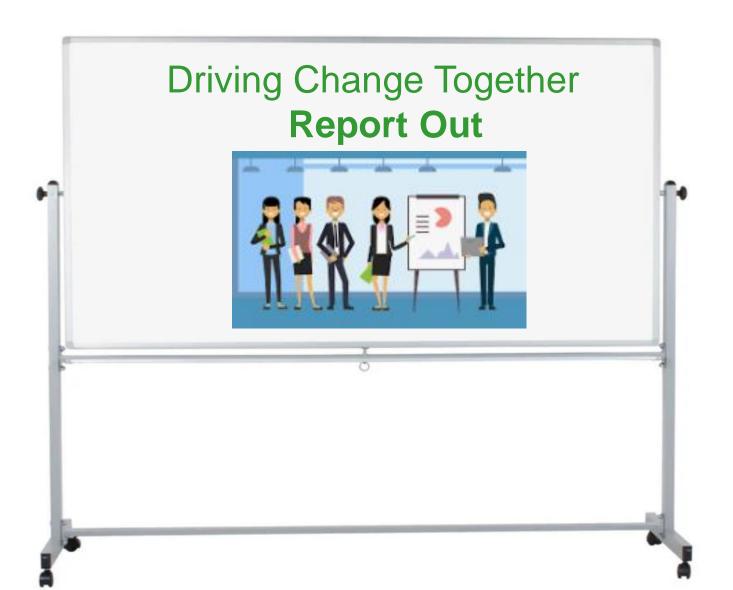
# Our community has the power to influence what's next for dentistry.







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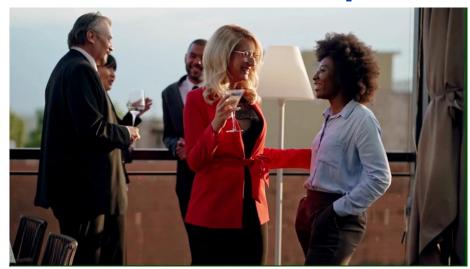
### Conference Wrap-up

Dr. George R. Shepley ADA President-Elect



#### Thank You!

# Please Join us for the Joint Presidents-Elect & Management Conference Reception



Located: ADA Lobby (First Floor)

Time: 5:30 pm - 7:00 pm

Sponsored by ADA Practice Transitions

