# 2019 ADA Management Conference

July 22-24, 2019  
ADA Headquarters  
211 E. Chicago Ave. Chicago, IL

(All sessions are located in the 2nd floor Hillenbrand Auditorium unless otherwise noted)

## Monday, July 22nd  
Ancillary Meetings & Welcome Reception

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
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<tbody>
<tr>
<td>7:30 am - 12:30 pm</td>
<td>Dental Philanthropy Network (DPN) – Room: D/E</td>
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<tr>
<td>8:00 am - 2:30 pm</td>
<td>Collaborative Counsel Workshop (CCW) – Room: Boardroom</td>
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<tr>
<td>12:45 pm - 5:30 pm</td>
<td>Association of Component Society Executives (ACSE) – Room: B/C</td>
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<td>2:30 pm - 5:30 pm</td>
<td>American Society of Constituent Dental Executives (ASCDE) - Room: boardroom</td>
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| 5:30 pm - 7:00 pm     | Joint Reception  
The ADA Foundation is hosting a joint reception for Presidents-Elect and Management Conference attendees at the MCA Museum.  
Mix, mingle and network with Conference attendees. |

## Tuesday, July 23rd  
Joint Session: Presidents-Elect and Management Conference

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<th>Time</th>
<th>Event</th>
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| 7:15 am – 8:15 am | Optional Dues Streamling Discussion  
2nd floor Hillenbrand Auditorium  
Breakfast provided |
| 8:00 am - 8:30 am | Badge Pickup and Breakfast  
2nd floor Hillenbrand Auditorium Foyer |
| 8:30 am – 9:15 am | Welcome / ADA Strategic Plan  
Kathleen T. O’Loughlin, DMD, MPH, Executive Director, ADA  
Ask the ADA  
Chad P. Gehani, DDS, ADA President-Elect  
Jeffrey M. Cole, DDS, ADA President  
Kathleen T. O’Loughlin, DMD, MPH, Executive Director, ADA |
| 9:15 am – 10:15 am | Leading-Edge, Effective Strategic Planning  
Dean A. West, FASAE, President, Association Laboratory Inc.  
An effective strategic plan provides a roadmap guiding staff implementation and volunteer leader oversight. Together, this partnership between staff and volunteer leaders, outlined in paper, represents a common framework for achieving the Mission-based and business goals of the association. Success requires each participant to understand their roles, trust the process and commit to long term, sustainable implementation. |
This session, using successes and failures from a variety of strategic planning engagements will be a no holds barred, authentic look at how staff and volunteer leaders can work together effectively on strategic planning.

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<td>10:15 am – 10:30 am</td>
<td>Networking Break</td>
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| 10:30 am – 11:15 am | Blending Work Styles for Successful Teamwork – Using DISC Profiling to Discover Your Work Style  
Jane Long, Ed. D, Staff Development Consultant, ADA |
| 11:15 am – 11:50 am | ADA Practice Transitions: Working Together to Solve Real Problems for Our Members  
Bill Robinson, President & CEO, ADA Business Innovation Group  
Suzanne Ebert, DMD, VP Dental Practice & Relationship Management  
Bree Simmers, Projects, Operations & Administration |
| 11:50 am – Noon | Wrap-Up for Joint Session                                               |
| Noon          | Presidents-Elect Conference is Complete                                 |
| 12:00 pm – 1:00 pm | Networking Lunch for Management Conference Attendees                  |

**Strategy, Planning & Evaluation**

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| 1:00 pm – 2:15 pm | 360 Review – The Environment Facing Associations  
Dean A. West, FASAE, President, Association Laboratory Inc. |
| 2:30 pm – 3:45 pm | Break-Out Sessions – Attendees to Choose One  
Creating and Sustaining Strategic Leaders in the Association (Room B)  
Dean A. West, FASAE, President, Association Laboratory Inc. |

Associations operate in a complex and dynamic environment. Knowing what will work and will not work moving forward is critical. This session highlights information collected from more than 200 association CEOs by Association Laboratory through, Looking Forward™, the nation’s most comprehensive and sophisticated environmental scan of the association strategy environment. The study assesses more than 50 environmental factors in five domains and more than 50 implications on association strategy. From workforce and technology to economic implications and the changing role of government, you will learn about the most substantial factors impacting association members and how these changes are influencing association membership, meetings, education and government affairs strategy.

Great volunteer leaders don’t suddenly appear at the Board. They are the product of a conscious attempt by the association to identify, vet and orient the best people for their future roles as professional leaders and advocates.

This session examines some of the common challenges to finding the best people to join your leadership team and highlights solutions to identifying and retaining the emerging leaders your
association will need to be successful. From their first volunteer experience to their time as past president, the presentation provides a holistic view of the leadership funnel and how to fill it with the best people. People you will need to be successful in a challenging and dynamic environment.

**How to Create Association Cultures that Promote Innovation and Teamwork**
*(Room D/E)*

*John Davidoff, Chief Mission-Driver, Davidoff Mission-Driven Business Strategy*

*Jacki Davidoff, Principal and Senior Consultant, Davidoff Mission-Driven Business Strategy*

One of the main obstacles to generating new ideas is a fear among staff that peers will ridicule their ideas. It’s not an idle fear, staff members have been known to prevent ideas that threaten their power or status. Drama is a block to individual and team effectiveness, innovation, risk-taking, vulnerability and overall performance. Participants will understand how to read people and increase their social and emotional intelligence, contributing to their personal and professional growth and satisfaction. Learn how to establish more genuine, cohesive teams in which individuals take risks, generate purposefully, celebrate wins, and learn from mistakes.

**Legal Issues**
*(Room C)*

*Staff of the ADA Legal Division*

This Workshop will feature a discussion of a broad range of legal issues of interest to dental association counsel and executive directors. Planned topics include:

- Overview of antitrust issues
- Specialty recognition
- Hot topics emerging from Contract Analysis Service
- Frequently-asked employment questions
- Developments in anti-discrimination laws

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**3:45 pm – 4:15 pm**

**Networking Opportunity with BMO Harris Bank**
*(Please make your way to the Auditorium for cocktails and horderves sponsored by BMO Harris Bank. Representatives will be onsite for a short presentation and to mingle with.)*

**4:15 pm – 5:00 pm**

**Cocktails and Conversations**

Round Robin (Three Topics / 15 minutes each)

- **HPI Trends:** Marko Vujicic, PhD Chief Economist & VP; Adriana Menezes, Senior Manager Operations, Health Policy Institute, ADA; Cassandra Yarbrough, MPP Lead Public Policy Analyst, HPI
- **Third Party Payer:** Dennis McHugh, Manager, Third Party Payer Advocacy Center for Dental Benefits; Sarah Tilleman, Senior Manager, Credentialing and Third Party Payer Advocacy
- **Dental Licensure Portability & Dental Licensure OSCE:** Tony Ziebert, DDS, MS Senior Vice President, Education and Professional Affairs, ADA; Dr. Joseph Crowley, DDS ADA Past President & chair of the Coalition for Modernizing Dental Licensure
- **ADPAC:** Sarah Milligan, Director Political Affairs, American Dental Political Action Committee (ADPAC)
- **Power of 3 – Collaboration Drives Membership Outcomes:** April Kates-Ellison, Senior Director, Member and Client Services
- **Update on Action for Dental Health:** Michael A. Graham, Senior V.P., Government and Public Affairs, ADA; Chad Olson, Director, State Government Affairs ADA
  - Jeff Troupe, Senior Legislative Liaison, State Government Affairs Government Affairs
  - Jane Grover, DDS, MPH, Director, Council on Advocacy for Access and Prevention
  - Marcelo Araujo, DDS, MS, PhD Vice President, Science Institute
- **ADA Practice Transitions:** Bill Robinson, President & CEO, ADA Business Innovations
  - Suzanne Ebert, DMD, VP Dental Practice & Relationship Management
  - Bree Simmers, Projects, Operations & Administration
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<td><strong>Breakfast</strong>&lt;br&gt;&lt;small&gt;2nd floor Hillenbrand Auditorium Foyer&lt;/small&gt;</td>
<td><strong>Power of Three</strong>&lt;br&gt;Jamie Murdock, Experient, Vice President of Sales&lt;br&gt;Molly Witges, Experient, Director Strategic Solutions&lt;br&gt; Hackathons are quickly becoming the most talked about conference experiences, as they deliver on two key attendee expectations for events: Learning and Networking. In this session, participants will utilize proven techniques for tapping the collective wisdom to create potential solutions for challenges that effect all associations.</td>
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<td><strong>Networking Break</strong></td>
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<td><strong>Membership Trends / New Dentist Segments / ADA Dues Streamlining</strong>&lt;br&gt;April Kates-Ellison, MS, CAE, Senior Director, Client Services, ADA&lt;br&gt;Robert Quashie, Vice President, Business Operations and Strategy, ADA&lt;br&gt;Steve Horne, Senior Manager, Research Insight, ADA&lt;br&gt;Pamela Von Lehmden, Senior Director, Brand Strategy &amp; Innovation, ADA</td>
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<td>11:05 am – 12:05 pm</td>
<td><strong>Break-Out Sessions – Attendees to Choose One</strong>&lt;br&gt;&lt;small&gt;(Room B/C)&lt;/small&gt;</td>
<td><strong>Converting Challenges to Solutions Using an Innovation Incubator</strong>&lt;br&gt;Addy Kujawa, Chief Executive Officer, American Alliance of Orthopaedic Executives&lt;br&gt;Vicki Sprague, American Alliance of Orthopaedic Executives&lt;br&gt;Many associations have innovative ideas for products and solutions but lack the resources and staff to move forward. Using design thinking practices, develop breakthrough ideas with limited investment of resources. Identify the root of problems and how to overcome the lack of resources so you can develop a prototype solution. Learn to help your association brainstorm towards solutions in a more efficient and innovative methodology.</td>
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<td><strong>Innovation Life Cycle and the Portfolio of Products and Programs</strong>&lt;br&gt;(Room D/E)&lt;br&gt;Max Suzenaar, CEO, Mindingyourbusiness&lt;br&gt;When is the right time to invest in growth or to sunset a program in your portfolio? How often does your association audit the lifecycles of your program? Analyze different methods of innovation thinking about refreshing programs before they reach maturity. Learn to use data tracking to forecast what the product will look like in future years. Understand the components that go into a product lifecycle.</td>
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<td><strong>How Are Participant Expectations Changing the Way We Meet?</strong>&lt;br&gt;(Room A)&lt;br&gt;Catherine Mills, Vice President, Conferences &amp; Continuing Education&lt;br&gt;Dawn McEvoy, Director, Continuing Education and Industry Relations</td>
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Kelly Wang, Senior Manager, Meetings  
Lynn Means, Executive Director, Oklahoma Dental Association

Consumer choices are increasingly driven by convenience, desire for experience and immediate gratification. Is it any surprise that this is affecting how people are making decisions about attending meetings, as well as how they value them? Join the conversation to explore the current trends in meetings and to hear about how the Oklahoma Dental Association went through the process of a meeting audit and how they are using this information moving forward.

**Learning Outcomes:**
- Review the current climate of meetings in general and where the dental meeting vertical plays a part
- Examine the Oklahoma Dental Association case study to draw parallels with your own meeting(s)

**12:05 pm – 1:00 pm**

**Lunch**
ADABEI Lunch is located in the Auditorium
Networking Lunch is located Breakout Room Foyer

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**Financial Management & Sustainability**

**1:00 pm – 1:45 pm**

**Small, Medium or Large – We All Need Non-Dues Revenue Growth!**
Nilesh Chandra, Partner, PA Consulting  
Jim Goodman, Senior Vice President, ADA Business Group  
Rich Schuch, Senior Director, American College of Chest Physicians

As normal inflation, pressures on membership dues and the constant demands to deliver more services and products the need for non dues revenues increase costs for associations and the importance of non-dues revenue growth becomes critical. Listen to three panelists provide multiple real examples of where growth can be found. Sometimes growth comes from detailed planning and development, while other times it comes with a simple change in perspective. Hear from Nilesh Chandra from PA Consulting who has worked with dozens of nonprofit medical/dental association’s developing concepts and opportunities. He will share some of the “homeruns, base hits and strike outs” from his years of experience. Rich Schuch will provide lessons learned from a medium to large medical association on recent wins and losses in non-dues revenue. Finally, Jim Goodman, ADA’s Sr. Vice President, business group, will wrap these examples together into common themes and provide a high level update on ADA non-dues operations. This rapid fire showcase of recent successes and failures will highlight each concept and how it came to fruition to spur ideas that your organization can apply.

**1:45 pm – 2:00 pm**

**Management Conference Wrap-Up**

**Management Conference is Complete**

**2:15 pm – 4:00 pm**

For-Profit Subsidiary Meeting – Room B/C

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**Speaker Bios:**

**Dean A. West, FASAE President of Association Laboratory– Association Futurist**

Dean West is a global association thought leader and futurist who has spent two decades researching the future of the association business model, the environment facing association members and the implications on association strategy and leadership. His career in the association sector spans a spectrum of experiences ranging from state lobbyist to chief staff officer.

An engaging, provocative and conversational speaker, he understands the unique needs of association leaders working in a complex, dynamic environment. From volunteer leadership to meetings and membership engagement, Mr. West uses the Association
Laboratory’s peer-based research to outline unique insights, inform and inspire association leaders.

**Background**

Dean West is the founder and President of Association Laboratory. Association Laboratory specializes in the research and development of association business strategy. The company serves a global client base of leading associations through offices in Chicago, IL and Washington, DC.

Dean West is a Fellow of the American Society of Association Executives. He authored the chapter on Membership Research for the ASAE book, Membership Essentials and the chapter on Marketing Professional Development Programs in the ASAE book, Core Competencies in Professional Development. Mr. West is a former member of the Board of Directors for the Association Forum of Chicagoland, Past Chairman of ASAE’s Professional Development Council and past member of ASAE’s Membership Council. He is lead researcher on *Looking Forward™*, the nation’s most comprehensive environmental scan of the association environment and *Planning for the Meetings of Tomorrow*, a technology environmental scan funded by the PCMA Foundation discovering changing uses of technology by meeting planners and attendees.

Dean West can be contacted at the following.
email: dwest@associationlaboratory.com
Phone: 312.224.2626
www.associationlaboratory.com

Vicki Sprague has more than 15 years of experience in program evaluation and outcomes management. She is passionate about helping organizations turn data into information that can be used for decision making and quality improvement. Sprague has a Doctorate in social psychology and expertise in data analysis, research methods, logic model development, and communicating results. She has successfully implemented data analytics and outcome evaluation programs and worked in collaboration with organizational and industry leaders to promote the effective use of data in a variety of settings. Sprague has shared results through a variety of presentations, reports, and publications.

Dr. Vicki Sprague can be contacted at the following:
email: vsprague@aaoe.net
Phone: 800-247-9699

Addy Kujawa, CAE, chief executive officer of the American Alliance of Orthopaedic Executives and the American Association of Orthopaedic Executives is a results-oriented, diplomatic, creative, energetic, dependable, motivational leader with outstanding, proven skills in most areas of association management. She is an expert in strategic planning, visioning, and executing an organizational plan. She knows how to engage members, volunteers, and staff in organizational mission goals and objectives. She is consistently successful at identifying and capitalizing upon market opportunities to maximize reach and drive revenue growth.

Addy has served as Chair and Vice Chair on the ASAE Membership Section Council and has also served on the ASAE Gold Circle Awards Committee and a number of other volunteer positions. She has been a content leader for negotiating, culture, hiring, membership models, AMS selection, personal branding, and more.

Addy Kujawa can be contacted at the following:
email: akujawa@aaoe.net
Phone: 800-247-9699
Max Suzenaar, MA, founded MYB 25 years ago following a 7-year career as a VP with a Disney affiliate. Over the past decade Max spearheaded the transition of MYB to an evidence-based strategic consulting agency. Leveraging research and data analytics, Max and his team have successfully collaborated with hundreds of associations to shepherd change, fortify relevancy to members and stakeholders, and enhance financial sustainability and growth

Max Suzenaar can be contacted at the following.
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Jamie Murdock is Vice President of Sales at Experient, a Maritz Global Events Company and has the responsibility of leading the strategic sales team, who is cultivating new customers for the organization. He is passionate about inspiring his team to be curious and encourages collaboration across all departments and a wide array of resources. He holds a BS in Business from Cornell University’s School of Hotel Administration. Prior to joining Experient, Jamie led the national sales team for Disney Destinations. He also held sales executive leadership roles at Zentila, Hyatt Hotels & Resorts, and Gaylord Hotels, where he was recognized as the Sales Person of the Year and received its CEO’s Leadership Excellence Award. Most recently he was awarded Citizen of the Year by Experient.

Jamie Murdock can be contacted at the following:
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Molly Witges returned to Experient in 2018 as a Director of Strategic Solutions after beginning her career there as a meeting planner. She is passionate about engaging audiences in new ways and helping organizations find process improvement. Previously she has held roles as Director, Strategic Accounts at a finance software company, Eved and Senior Manager, Conference Services at the American Dental Association managing technology solutions and meeting planning for ADA’s annual meeting. Molly currently serves as a board member for the Professional Convention Management Association (PCMA), Greater Midwest Chapter and mentors students at Purdue University where she is a proud hotel management alumna and ambassador for all things Boiler Maker.

Molly Witges can be contacted at the following:
email: molly.witges@experient-inc.com
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https://www.experient-inc.com
John Davidoff is the founder and Chief Mission-Driver of Davidoff Mission-Driven Business Strategy. With 35 years of experience working with local, national and international nonprofits, philanthropic foundations, associations, municipalities, and business organizations, John Davidoff is recognized as a leader in strategic planning, marketing and communications, thought leadership, partnership marketing, sponsorship, and business development. He is the architect of Davidoff’s proprietary Mission-Driven Strategy & Marketing methodology. Prior to founding Davidoff Strategy in 2005, John held executive management positions with DDB Worldwide, Omnicom, General Growth Properties, and Entertainment Marketing, Inc. John’s broad client experience includes work in social causes, education, healthcare, the environment, public transportation, and arts.

John is a founding board member and secretary of the Wright Foundation for the Realization of Human Potential. He is a graduate of the Park School of Communications at Ithaca College in New York and recently completed his Master’s in Transformational Leadership and Coaching at the Wright Graduate University for the Realization of Human Potential. He began his doctoral studies in February 2018. John lives in Evanston with business partner and wife Jacki, and their two sons.

John Davidoff can be contacted at the following:
email: john@davidoffstrategy.com
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www.DavidoffStrategy.com

Jacki Davidoff is the Principal and Senior Consultant of Davidoff Mission-Driven Business Strategy. With 30 years of experience bridging nonprofit and corporate positions, Jacki has experience leading national advertising agencies and senior executive positions in Chicagoland nonprofits. Jacki leads organizations to strengthen relationships among staff and with external audiences through Davidoff’s Mission-Driven process to articulate their potential.

Prior to joining Davidoff Strategy, Jacki completed nine years at the Chicago Botanic Garden where she worked in leadership roles in marketing, communications, and corporate/foundation fundraising, increasing the organization’s national and regional presence and growing its corporate support to record levels. Jacki has provided leadership in strategy and marketing for the Association of Fundraising Professionals, Executives’ Club of Chicago, Forefront, Illinois Children’s Healthcare Foundation, and Jewish Council for Youth Services, among others.


Jacki Davidoff can be contacted at the following:
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www.DavidoffStrategy.com

Nilesh is a Partner in PA’s Healthcare business focused on helping Healthcare Association clients in developing new business models and non-dues revenue growth strategies. He has strong experience in developing and implementing strategy, business plans, process
transformation and technology strategy. Recently, he has been engaged by a leading specialty society in developing a data monetization strategy and business model for a large data registry.

In the last three years, Nilesh has helped five clients explore their non-dues growth strategies and supported them in implementing those strategies.

Nilesh holds a MBA from Cornell University, NY with a focus on strategy and operations. He also holds a Six Sigma Green belt certification, a certification in Business and Enterprise Architecture from Henley Business School and is accredited as a Lean expert by the Lean Enterprise Research Center at Cardiff Business School.

Nilesh Chandra can be contacted at the following:
Nilesh.Chandra@PAConsulting.com

Rich Schuch, MS, EdD has over 25 years of experience in the non profit business sector, including time with DePaul University, the ADA and his current role with the American College of Chest Physicians (CHEST) where he oversees their in-person domestic and international education including their annual meeting, board review and training center.

Rich Schuch can be contacted at the following:
email: rschuch@chestnet.org
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