

Working Strategic Plan for the Seventh District Dental Society (Long Version)

Mission: The source for inspiring excellence in dentistry.

Vision: To become the leading resource to empower the dental community to achieve optimum health for all.

Core Values:

- Inclusive collegiality
- Advocacy
- Integrity
- Veracity
- Evidence-based practice
- Mentorship
- Accountability
- Leadership
- Transparency

Membership Goal: To nurture a vibrant membership.

Strategy: Achieve objectives by focusing on new dentists and residents, non-members, and non-renewals. *Percentages edited as a result of ADA Fonteva/Salesforce challenges.

Objectives:

- 1) Increase overall 7DDS membership year over year.
 - a. Provide an annual presentation to dental residents of district educational stakeholders with email follow-up
 - b. Annual survey to new dentists and residents; survey to non-members
 - c. Utilize social media/website to highlight new dentist members/market member benefits
- 2) Recruit as many as possible new dentists in the area.
 - a. Send welcome email/letter/gift; hand deliver when able
 - b. Work with district educational stakeholders to identify graduating residents planning to work in the region
 - c. Offer new, innovative programming to target new dentist audience
 - d. Develop mentorship program to partner a new dentist with an experienced dentist
 - e. Extend personal invitation to join a committee; get involved in activities
- 3) Maintain a retention rate >90%.
 - a. Communicate the value of membership through multiple touch points, i.e., Email, mail, phone, website, social media
 - b. Offer new, innovative programming to appeal to current members
 - c. Survey members or create focus groups on value of membership

Strategy: Focus on resident education emphasizing the value of membership.

Objective:

- 1) Increase the number and type of outreach to area dental residents by hosting two events and activities for residents.
 - a. Work with state residency program directors to plan, implement, market events/activities. Require registration to obtain contact information.
 - b. Share member benefits via social media and by partnering with program alumni
 - c. Host a job fair; share classifieds info. to assist in job placement
 - d. Offer mentorship relationship with local, seasoned dentists in various specialties

Strategy: Create a culture of equity, diversity, and inclusion.

Objectives:

- 1) Attract and retain a diverse membership body.
 - a. Recruit, acknowledge, and recognize members regardless of age, ethnicity, gender, sexual orientation, or cultural background.
 - b. Challenge assumptions about DEI and identify qualities of a board/committee member.
- 2) Promote diversity, equity, and inclusion (DEI) in everything we do.
 - a. Advocate for and support board-level thinking about how systemic inequities impact the organization.
- 3) Ensure accountability to diversity and inclusion efforts in serving the membership body.
 - a. Acknowledge and dismantle any inequities within office and board policies, systems, programs, and services; rewrite policies where needed.

Finance Goal: To ensure 7DDS has sufficient funds to meet its budgetary requirements and implement its Strategic Plan.

Strategy: Maintain a balanced budget and an appropriate reserve.

Objectives:

- 1) To ensure transparency, the Treasurer will give a Statement of Financial Position at every board meeting. It is advised a quarterly YTD budget report be presented at the first board meeting 30 days following a quarter close to include an explanation of variances.
 - a. Create defined roles and responsibilities for staff and consultants as it relates to maintaining the financial records of the District.
 - b. Create an accounting procedure manual to be shared with the Board annually.
 - c. Utilize P&L statements and online resources to reconcile income and expenses monthly.

- 2) To appropriately manage the investment account, the Finance, Budget, and Audit Committee (FB&A) is advised to complete an annual review of the reserve investment account and policy and provide a report to the board at least once a year.
 - a. Establish annual goals for the investment account based on current/projected market conditions.
 - b. Meet with professional account representatives annually to review strategies and make adjustments to maximize investment performance.

Strategy: Develop and maximize all potential sources of non-dues income.

Objectives:

- 1) Leverage membership and key community stakeholders to identify and solicit new sponsors.
 - a. Create a list of new sponsorship opportunities with multiple levels of engagement.
- 2) Grow Fortress's book of business and increase member engagement with additional insurance products and services.
 - a. Collaborate with current Fortress policyholders to identify new prospects/outreach to non-policyholders
 - b. Conduct personal outreach and targeted marketing to promote other insurance products and services

Strategy: Continuously monitor adherence to accepted organizational financial best practices and evaluate and respond to risks to the profession and society.

Objectives:

- 1) Establish a defined Audit and Risk Assessment sub-committee of the current Finance, Budget, and Audit Committee.
 - a. Populate this sub-committee with members familiar with the roles of an audit committee.
 - b. Consider including an independent knowledgeable consultant with the right to vote.
 - c. This sub-committee to work closely with the society Treasurer, Executive Director, and current accounting firm.
 - d. Sub-committee to report directly to Budget, Finance, and Audit Committee, with an annual audit/risk report to the Board
- 2) Perform an independent third-party internal audit as necessary.
 - a. Immediately establish a corrective action plan, if any reported findings and/or recommendations, with appropriate time-frames for completion.
 - b. Present a dashboard report to the Board semi-annually until all measures have been completed.
 - c. Consider adding a line-item annually to the society budget to be prepared for the internal audit.

Organizational Goal: To ensure 7DDS has systems in place to achieve operational excellence.

Strategy: Review and revise the committee structure of the 7DDS Board to maximize participation and engagement.

Objective:

- 1) Charge the appropriate committee with the annual review of committee make-up, charge, and frequency of meeting.
 - a. Survey members annually to assess member interest and needs of the organization.
 - b. Ask each committee chair to complete a self-assessment of their committee.

Professional Excellence Goal: To support, develop, and acknowledge professional excellence in our region.

Strategy: Provide and facilitate evidence-based CE of the highest order using both traditional and virtual methods.

Objectives:

- 1) To support multiple remote “Zoom” 2-hour CE credit courses offered annually through Monroe County Dental Society’s Rochester Dental Study Club (RDSC)
 - a. Work with Board volunteers to identify potential speakers, brainstorm programming topics, and promote RDSC events.
- 2) To provide a minimum of 2 full-day CE course offerings annually with a goal to host one event every other year outside Monroe County.
 - a. Seek to offer courses relevant to target audiences.
 - b. With speaker approval, offer courses as a live webinar and to be made available to members after the event for an established fee.
 - c. Recruit one or more volunteers, outside of Monroe County, to assist in planning and implementing an event in their county.
- 3) To encourage each county to provide at least one CE course to all members in the District.

Strategy: Actively engage in leadership development at the county, district, state, and national levels.

Objectives:

- 1) Reactivate and revise, the mentorship program to connect new dentists with more established dentists in the community.
 - a. Develop a training/resource document for mentors including expectations for participation in the program.
 - b. Market the mentorship program through the website, eblast invitation, and social media.
- 2) Encourage all standing committees of the board to invite a new dentist to serve on their committee.

Strategy: Create a regional task-force on dental hygiene/assisting workforce issues.

Objective:

- 1) Recruit 2-4 district members to serve on a task-force in collaboration with district educational stakeholders.
 - a. Leverage existing relationships with key leaders to establish advisory roles for 7DDS members within regional educational organizations.
 - b. Assign oversight of the task force to an appropriate board committee.

Communication Goal: To engage in effective communication about district services and resources with the District's varied constituents.

Target markets:

- Members
- Non-members
- Board/committee members
- Dental administrators/staff
- Patients/community members

Strategy: Strengthen the 7DDS brand image (how customers think and feel about you) through brand awareness (what they know about you).

Objectives:

- 1) Survey members or create focus groups annually to identify member perceptions— what do members know about us/how are we a resource.
- 2) Create a list of dental administrators/staff for mailing/outreach.
 - a. Work with dentist members to obtain office administrator(s) contact information.
- 3) Survey dental administrators/staff annually to identify perceptions.
- 4) Educate the community about resources available and how to use them.
 - a. Utilize the website to educate the community, i.e., articulate to patients how to file a complaint and locate a dentist in their area.

Strategy: Develop an increased understanding of legislative issues and advocacy efforts.

Objective:

- 1) Recruit 1-2 members to research and report on advocacy efforts at the local, state, and national level 1-2 times annually.
 - a. Work with NYSDA, the ADA, and the appropriate state PAC to obtain information.
 - b. Report appropriate information on the website and to members through multiple communication vehicles.

Strategy: Strengthen relationships with regional stakeholders to improve oral health in communities in need

Objective:

- 1) Create a list of district educational, clinical, and legislative stakeholders. Leverage existing relationships to open/continue communication.
 - a. Schedule 1-2 meetings annually with key leaders to provide a breeding ground for discussion and collaboration.
 - b. Plan and implement a joint event to address a common problem, i.e., recruiting quality applicants for dental staff positions.

Strategy: To increase member engagement/satisfaction through regular communication.

Objectives:

- 1) Increase social media followers.
 - a. Develop and implement a marketing campaign to invite followers, share content/posts.
- 2) Create and distribute an e-newsletter to members to include member benefits, event news, county updates, etc.
 - a. Generate content from appropriate board committees.
- 3) Regularly review and update website content/features to enhance/simplify the user experience.