

Component Task Force

Report to the 2018 ODA House of Delegates

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Historical Perspective

For several years, the Leadership Development Committee and Board of Trustees have discussed trends, concerns, and conceptual solutions to ensure basic core services are available and sustained for members, regardless of which component society their membership is based in. The ongoing challenge is addressing the individual society capacity, knowledge, leadership development, continuity, sustainable funding, and access to quality education programs and speakers.

ODA continues to offer and provide basic support for local dental societies to assist in membership outreach, communications, meeting coordination, speaker selection, and basic governance assistance. Over the past four years, ODA staff have assisted the following components (at no cost to the society) with positive feedback and results from each:

- Central Oregon (Administrative support)
- Clatsop Dental Society
- Klamath Dental Society
- Marion-Polk Dental Society (Interim staff and governance support)
- Mid-Columbia Dental Society
- Southern Oregon Dental Society (Interim staff, communications, and staff education)
- Southern Willamette Dental Society
- Southwestern Oregon Dental Society
- Umpqua Dental Society
- Washington County Dental Society (Interim staff, communications, and governance support)

During this pilot process of supporting unstaffed and staffed societies upon request, additional ADA & ODA Loyalty Study research continued to illustrate the importance and frequency of component society programming and opportunities in member satisfaction, loyalty, and retention rates. Societies that do not provide consistent

programs have significantly lower retention rates and levels of satisfaction, loyalty, and member engagement.

Ongoing challenges with many of the dental societies have resulted in a lack of adequate leadership development, training, continuity, and engagement within ODA's overall governing bodies and annual House of Delegates. The association relies upon input and representation from all societies to represent members across the state, and is not able to best serve members without it.

In order to learn more, the Board of Trustees began outreach to component leaders during the summer of 2017. Trustees gathered insights from leaders from the following components:

- Central Oregon
- Clatsop County
- Eastern Oregon
- Klamath County
- Lane County
- Marion & Polk
- Mid-Columbia
- Multnomah
- Rogue Valley
- Southern Oregon
- Southwestern Oregon
- Umpqua
- Yamhill County

As a follow up to the Board of Trustees outreach, all component leaders were invited to participate in a conference call, facilitated by Erin Mahoney from Cascade Employers Association. The call had representatives from:

- Clackamas County
- Multnomah
- Rogue Valley
- Washington County

Several common themes were evident from these discussions. Administrative burdens were one of the most commonly named challenges, especially amongst unstaffed societies. Additional challenges that were frequently mentioned included leadership succession planning, compliance issues, engagement, and recruitment. Comradery and professionalism were two of the most common successes, and components were split on whether they considered local education a success or challenge.

Simultaneous to these ODA efforts to better understand component member services, offerings, successes and challenges, the ADA Board commissioned a project with a global design and strategy firm geared towards addressing many similar key areas and considerations. The program objective is intended to "define a financially sustainable,

member-centered vision and forward-looking strategy that will reshape the ADA's future relationship with its members."

In the attempt to generate as much input from society leadership as possible, a mega-issue discussion was facilitated at the 2017 ODA House of Delegates. Delegates from all sixteen local dental societies were requested to come prepared to share insights from their society's successes and challenges, and how/what role ODA plays in supporting efforts to provide exceptional, consistent service and offerings to all tripartite members.

Onsite, the following twelve dental societies had delegates present to participate in the mega-issue discussion:

- Central Oregon
- Clackamas County
- Eastern Oregon
- Klamath County
- Lane County
- Marion & Polk
- Mid-Columbia
- Multnomah
- Southern Oregon
- Southern Willamette
- Washington County
- Yamhill County

Delegates formed groups of six, to share their component's insights on the following questions:

1. From the member perspective, what do you feel is the most valuable membership benefit or offering at the local component level?
2. What is or would be the most vital contribution of the ODA when it comes to supporting components?
3. Leadership recruitment and succession planning has been an ongoing challenge for many components. What ideas or solutions do you have for recruiting and engaging leaders?

Each group shared a key takeaway following group discussion. All insight reported out to the group and shared within the small groups was compiled by ODA staff and summarized.

Below is a summary of key takeaways from the discussion:

- The most valuable benefits of the local dental society are the social aspects, networking, camaraderie, and continuing education.
- Open communication between the state and local level is critical to fostering a cohesive message to members and potential members.
- Regulatory and advocacy support are extremely beneficial at the state level.
- Administrative tasks are burdensome for unstaffed societies.
- Many local levels need assistance with membership recruitment and engagement of new members.
- Succession planning, volunteer recruitment and training of volunteers is essential to success. Mentorship and personal outreach are beneficial to identify and develop leaders at the local level. Onboarding resources and regular leadership training is needed at the local level.

2017 House of Delegates Directive

Following the mega-issue discussion noted above, the 2017 ODA House of Delegates passed a resolution directing the ODA to create a task force, appointed by the Board of Trustees, to explore component education and support, including governance implications, and report its findings and recommendations back to the 2018 House of Delegates.

Component Task Force Process

The Component Task Force consists of seven official members appointed by the President of the Oregon Dental Association. The task force is comprised of a Chair (ODA President-Elect) and six (6) members, including a member representative from Central Oregon Dental Society, Eastern Oregon Dental Society, Southern Oregon Dental Society, Southwestern Oregon Dental Society and Washington County Dental Society, as well as one component Executive Director.

Since the 2017 House of Delegates, the Task Force met five times, discussing the available data and identifying additional data needed in order to gain a clear understanding of the successes and challenges within each of ODA's sixteen (16) dental societies (See Appendix A). The Task Force's goal is to determine what recommendations, if any, should be submitted to the 2018 House of Delegates in an effort to guarantee basic levels of support and services at the local level and a consistent member experience regardless of where a member practices in the state.

Following the creation of the Component Task Force and appointment of members, a communication (See Appendix B) from Dr. James McMahan (Chair), was emailed to all component leadership and staff. The communication shared the charge of the Task Force, the list of members, and the full Task Force Charter. In addition, the communication encouraged collaboration in the months moving forward, welcoming candid feedback throughout the process.

After an extensive review and discussion of the data collected (identified in the *Historical Perspective* section of this report), the Task Force identified the blind spots in the data collected. Recognizing that the feedback gathered had been primarily limited

to component leadership, the Task Force developed a survey to gather additional insight from the general membership in two areas:

1. Support and services at the local level
2. Component structure

To better understand the member's perspective and experience on local support and services including current and future usage and expectations, a survey was developed and sent to all members (See Appendix C).

The survey was distributed via the following platforms:

- As a stand-alone email on March 19th with an open rate of 30%. A follow-up reminder email was sent on April 13th with a 28% open rate.
- Included as part of the ODA Insider e-newsletter on April 18th. Open rate was 30%.
- Shared in the Leadership Exchange (communication sent to all local society leadership and staff) with a request to share the survey within local communication channels.

A similar survey (See Appendix C) with questions modified to be relevant, was distributed to all non-members as a stand-alone email on March 23rd. The email had a 21% open rate. A follow-up email was sent on April 13th and had a 19% open rate.

In addition to the Support and Services Survey, the Component Task Force assembled and distributed another communication (See Appendix D) requesting feedback focused on component structure and a consolidation concept. As conveyed in the communication, the consolidation concept is a potential strategy to ensure consistency in education, networking and additional member service offerings throughout the state with the goal of offering a local structure that fosters and supports an enhanced member experience for all tripartite members, while retaining established local connections and member communities. In addition to enhancing the local experience and offerings for all ODA members, the Component Consolidation Concept moves towards a more regional structure and equal distribution of members, while being mindful of distance and geographic barriers.

The consolidation concept communication was distributed via the following platforms:

- As a stand-alone email on May 22nd with an open rate of 35%. A follow-up reminder email was sent on June 4th with a 33% open rate.
- Included as part of the ODA Insider e-newsletter on May 30th. Open rate was 38%.
- Shared in the Leadership Exchange (communication sent to all local society leadership and staff) with a request to share the survey through local communication channels.
- As a stand-alone email to component leadership and staff requesting to share through local communication channels.
- Colleague to colleague outreach. The ODA Board of Trustees and Leadership Development Committee undertook grassroots efforts to encourage feedback.

- Discussed at the Staff Council meeting on May 30th among ODA staff and local dental society staff to gauge initial response at the local level and brainstorm outreach efforts to ensure additional member feedback.

After taking into account the critical feedback received from members, the Task Force discussed multiple modifications to the consolidation concept and other ways to obtain the goal of consistency in education, networking and additional member service offerings throughout the state.

The Task Force determined that additional information was needed from the following local areas which had a negative response and/or a very small response rate. The Task Force reached out to leadership within these areas to further understand individual needs of the area and its members.

- Clatsop County
- Klamath County
- Southern Willamette
- Southwestern
- Umpqua
- Yamhill County

Findings

Local Support and Services Survey:

142 members completed the survey: 109 from staffed societies and 33 from unstaffed. This represents 6% of ODA membership. In addition, 18 non-members participated. 86% of respondents indicated being in practice for 16 or more years.

The Task Force reviewed and discussed the following highlights. Please see Appendix C for a complete summary of the results.

- Regarding satisfaction of support and service opportunities at the local level, those in a staffed component have the highest level of satisfaction with a 7 out of 10 ranking. Unstaffed society members had an average ranking of 5.3. Non-members had the lowest ranking with a 3.4 out of 10.
- Regarding participation in another society's dental meetings/offerings, 75% of respondents do not crossover. The highest level of crossover was indicated by the members who replied from Multnomah and Washington County Dental Societies.
- When it comes to expectations of a local dental society, the universal theme from all categories is the expectation that CE be offered, followed closely by in-person networking opportunities. Staffed societies have a higher member expectation regarding phone support and website offerings than unstaffed society members. Non-members have overall higher expectations than members when it comes to support and offerings outside of CE. Other expectations, outside of those listed in

the survey, included advocacy, email/newsletter communication and endorsed services.

- 75% of all respondents preferred to have local/regional continuing education available.
- Overall, 35% of respondents would travel 75+ miles to an ODA hosted educational and/or networking offering. Unstaffed society members are the most likely to travel 75+ miles to attend. Among non-members, none indicated not being interested in an ODA offering. This is encouraging, but we know with CE commoditization that it is no longer a key driver of membership.
- Regarding virtual meeting opportunities, respondents were split on the value. Unstaffed societies who could potentially benefit the most, indicated the least perceived value. Non-members showed the highest interest in virtual opportunities.

Component Consolidation Concept:

201 members provided feedback, representing all sixteen (16) local dental societies. 25% of respondents have been in practice 10 years or less; 23% have been in practice 11 – 20 years; and the remaining 52% have been in practice 21+ years or are retired. When asked about initial reaction to the proposed consolidation concept, 41% responded with positive; 24% with neutral; and 25% with negative. The majority of the negative responses came from members in the following societies: Marion & Polk, Rogue Valley and Southern Oregon.

The Task Force reviewed and discussed the following general themes/takeaways from the responses:

- Appreciation of a more equal distribution of members throughout the state.
- Value seen in consolidation for smaller components but concerned with pairing Clatsop and Mid-Columbia with a tri-county component. Would this be a good social/cultural fit?
- Beneficial to pool resources and alleviate administrative burdens.
- Local connections are important and should be preserved. As one respondent noted “balance small groups’ sense of local community with organizational efficiency”
- Retaining local connections and efforts could be focused on charitable care.
- Consolidation does not address engagement and the individual needs of the member. What is the role of the component today? What offerings are important and foster participation?
- Even with consolidation the same problems and lack of interest in leadership opportunities may continue, just on a much larger scale.
- New structure would make it even more critical for local leadership to keep members informed.
- Need to address the ‘unincorporated’ areas in the new structure.
- Consolidation concept needs to be further clarified. This is not a large component absorbing a small component situation, but the creation of a “New” component society.

In addition to overall themes and considerations, the unique responses from each proposed consolidation area were analyzed and discussed. These individual summaries can be found as part of Appendix D.

Follow-up Outreach to Component Leaders:

The Task Force continued to struggle with contacting local leadership for discussion and insight. From the follow-up outreach, the following areas provided additional feedback for consideration.

- Clatsop County
- Southern Willamette
- Yamhill County

Conclusion & Recommendations

Following all outreach and surveys, local component leadership, component staff and members, the Task Force identified the following common themes:

- ***Administrative burden and lack of continuity for smaller, unstaffed societies***
- ***Lacking resources and/or access to continuing education speaker programs***
- ***Need for identification, training, and continuity of leadership for each society***

Even with the above common challenges and many similarities, the Task Force understands that each dental society is unique with its own set of considerations. For this reason, the Task Force has come to the conclusion that there is not a single, universal recommendation, but a collection of recommendations that each component is asked to consider and implement based on the culture and specific member needs within the area. The Task Force feels these recommendations support the goal of being able to offer basic support and services to all members of the tripartite, regardless of practice location. Each component is asked to review and take action on the following recommendations:

1. **Component Structure:** With a wide range of responses to the component consolidation concept and some members adamantly opposed, the Task Force cannot recommend a universal consolidation at this time, as presented in the communication to members. However, there is consensus that consolidation should be further explored and could be very beneficial to the smaller and/or inactive components and warrants further consideration at the local level. In the areas of the state where the consolidation concept was well received or had a neutral response, the Task Force encourages local leaders to continue to explore the feasibility. ODA staff is equipped to organize stakeholder meetings with local leaders in areas of potential consolidation and assist with the conversations and process as requested.
2. **Communication and Administrative Support:** The ODA will continue to offer and provide basic support for local dental societies to assist in membership outreach, communications, meeting coordination, speaker selection, and basic governance assistance on a complimentary basis. In an effort to enhance these offerings and centralize and streamline local communications, the Task Force

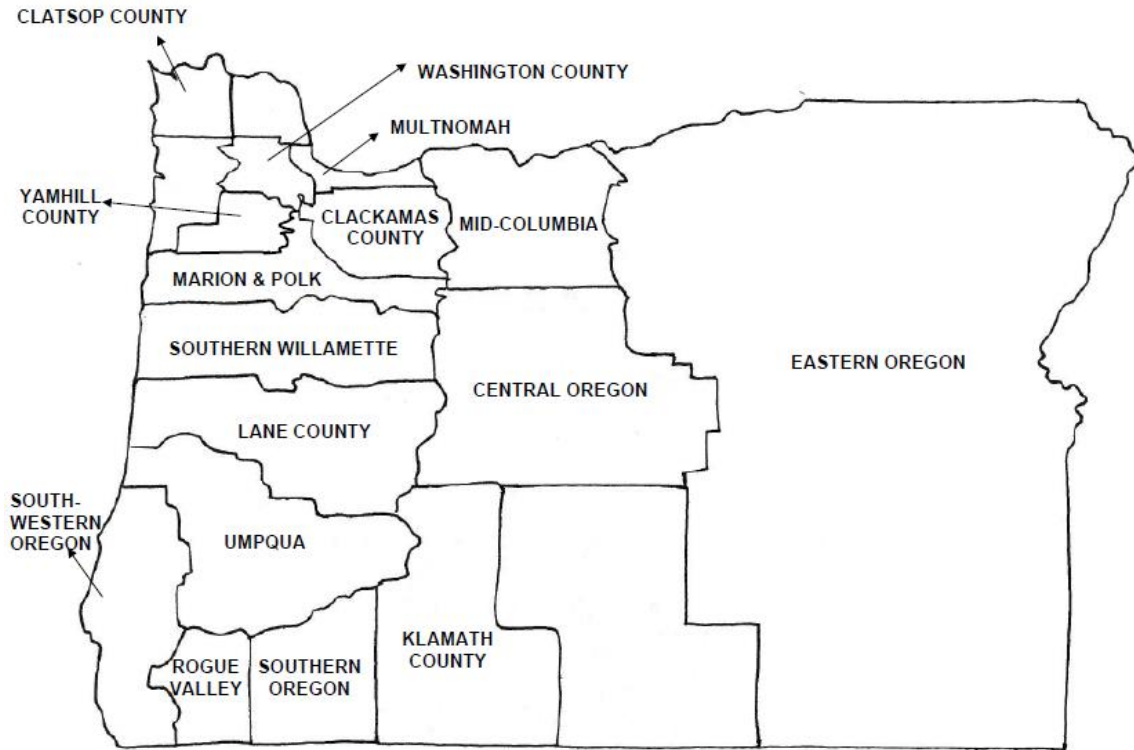
recommends that all unstaffed local societies utilize the ODA central office as a communication clearinghouse. This would assist local societies with formatting communications, guarantee data validity of member and non-member mailing lists, and allow for a basic level of participation/benefit usage tracking in the membership database. For components in need of service and support above what is feasible for ODA staff to currently provide at a complimentary level, the ODA is open to exploring and beta testing a managed service opportunity, providing a shared staff position to execute the necessary administrative tasks and services available at the local level. Interested components should contact ODA staff to discuss this opportunity further.

- 3. Leadership:** Leadership identification, recruitment, onboarding and ongoing training is a consistent and critical challenge at the local level. The ODA currently offers an online component leadership toolkit (See Appendix E) outlining support available through the central office, paired with helpful resources to support the roles and responsibilities of local leaders. In addition, resources are available from the ADA Client Services division, with a library of reference materials and videos regarding governance and leadership development (See Appendix F). The Task Force would like to see the ODA resource expanded, based on the needs of component leadership. Components are requested to review the current toolkit and provide guidance on additional resources and areas of need. In addition, the Task Force would like to see annual regional trainings implemented. At the trainings, local leaders would be trained and armed with resources to excel in their role and align the work and communications within the tripartite to support members in Oregon. Ideally, trustees from the ODA Board would be present at each of the regional trainings to foster connections between local and state leaders. Whenever possible, trainings will be paired with continuing education opportunities to add value to component leaders and to provide an additional CE offering to the members in the area. *In concept, these trainings and ongoing leadership development are easy to schedule out and support – but the critical piece is a commitment from all component societies to participate and engage in the process fully.*

The Task Force feels that the recommendations listed within *Communication and Administration Support* and *Leadership* sections above are directly correlated. A consistent theme among unstaffed components is the daunting responsibility of stepping into a leadership role without adequate record keeping and support available. Officer responsibilities of membership recruitment, engagement and retention is an overwhelming expectation for a volunteer leader often exceeding feasible time commitments. The Task Force asks that this correlation be kept in mind when evaluating and determining the critical next steps to ensure the future success of each component society.

Appendices

Appendix A: Component Map & 2017 EOY Membership Counts



Central Oregon	138
Clackamas	232
Clatsop	38
Eastern Oregon	72
Klamath County	34
Lane County	223
Marion Polk	203
Mid-Columbia	31
Multnomah	529
Rogue Valley	49
Southern Oregon	113
Southern Willamette	118
Southwestern Oregon	50
Umpqua	45
Washington County	341
Yamhill County	27
ODA Total	2243

Appendix B: Component Task Force Creation email to Component Leadership

The 2017 House of Delegates unanimously passed a resolution directing the ODA Board of Trustees to create a Component Task Force. This Task Force is directed to explore component education and support, including governance implications, and report its findings and recommendations back to the 2018 House of Delegates, scheduled for September 8, 2018 at Sunriver Resort.

Attached please find a copy of the [Task Force Charter](#) for your reference. The Charter provides you with an overview of the project, a summary of the valuable work that has been completed to date, the goal moving forward (including timelines), and a list of the Task Force members that have graciously agreed to serve.

The Task Force cannot execute the House's directive alone. As component leaders and local experts, the group will be requesting your participation and insight throughout this process to develop a recommendation that best serves and supports our members. We ask for your timely and honest response to all Task Force inquires. We also welcome the opportunity to attend an upcoming component meeting to discuss your society's successes and challenges, and how/what role ODA can play in education and support efforts in the future.

I thank you in advance for your participation in this important initiative and your continued efforts on behalf of the association.

Sincerely,
James McMahan, DMD
ODA President-Elect & Component Task Force Chair
Eastern Oregon Dental Society

Appendix C: Support & Services Survey

[Member Survey](#)

[Non-Member Survey](#)

[Summary of Results](#)

Appendix D: Component Consolidation Concept Communication

[Communication and Survey](#)

[Summary of Results](#)

Appendix E: Leadership Toolkit

[Local Leadership Resource Toolkit](#)

Appendix F: ADA Resources

[ADA for Dental Societies](#)