



# Strategic Long-Range Plan

*Revised November 7, 2009  
Board of Trustees*

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## **10-30 YEAR PLANNING HORIZON: CORE IDEOLOGY AND ENVISIONED FUTURE**

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**CORE IDEOLOGY** describes an organization's consistent identity that transcends all changes related to its relevant environment. Core ideology consists of two notions: core purpose (the organization's reason for being) and core values (essential and enduring principles that guide an organization).

**ODA Core Purpose:** To advance the dental profession and to promote the highest standard of oral health and oral healthcare

### **ODA Core Values:**

- Integrity, honesty, ethics
- Caring and charity
- High standards and quality care based on scientific principles and clinical judgment
- Prevention
- Lead, represent and provide service to the profession and the public; patient advocacy; promote the value of health
- Collegiality; collaboration; peer support; communication
- Education
- Doctor – patient relationship

**ENVISIONED FUTURE** conveys a concrete, but yet unrealized, vision for the organization. It consists of a big audacious goal (a clear and compelling catalyst that serves as a focal point for effort) and a vivid description (vibrant and engaging descriptions of what it will be like to achieve the big audacious goal).

**Big Audacious Goal:** To be the most respected voice of the dental profession.

### **Vivid Descriptions:**

- ODA's opinion will be routinely sought and patients will ask if dentists are members of ODA; ODA will be quoted in the media.
- ODA will be widely recognized as the premier resource for oral health care in Oregon.
- There will be a feeling of ownership among the members and any dental professional would be proud to be a member.
- The ODA will be at the forefront to reduce and eliminate barriers to access to care.
- ODA will be the role model for all constituent dental associations.
- There will be no interference in the doctor-patient relationship.
- Quality continuing dental education opportunities will be available to all members of the dental community.
- The ODA will be at the forefront of promoting community health and preventive programs.

## **5-10 Year Planning Horizon: Assumptions about the Relevant Future**

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*The Association's strategic long-range plan must be based in part on a projected view of the future environment of dentistry and the relevant world at large. Foresight about the relevant future is what will make the long-range plan "strategic." Building foresight requires a look at three levels of future orientation:*

- **Current conditions**—which represent our view of what exists today;
- **Trends**—which reflect what conditions we can see today and the predictions we can make about what direction the conditions will move in;
- **Assumptions**—which reflect our beliefs about what will happen or how things might be in the future, not necessarily based on what we see today.

*When conditions change, strategy needs to be adjusted. An annual review of this thinking will help the association ensure the ongoing relevance of its strategy.*

### **DEMOGRAPHICS and SOCIETY**

1. There is and will be a geographic disparity in dental care providers.
2. People will retain their teeth longer.
3. Bigger disparity between socio-economic groups.
4. There will be an increase in home-bound and care facility residents.
5. There will be an increase in extremely medically compromised patients.
6. Dentistry continues to compete with other health care concerns for resources.
7. The dental workforce with adaptations may keep pace with population needs.
8. Technology and affluence of society will change need for services, yet dental disease will always be a problem.
9. The immigrant population will begin to level due to the economy.
10. New discoveries in prevention and cure of disease will occur – secondary problems will arise.
11. Adverse effects of medications on the market and drugs of abuse will cause dental complications.
12. There will be an increased public understanding that one cannot have good overall health without good oral health.
13. Medical and dental care will become more collaborative.

### **POLITICS and SOCIAL VALUES**

14. The public will continue to become increasingly knowledgeable about dentistry and dental procedures both from dental and non-dental sources.
15. A significant percentage of the population will continue to ignore the benefits of preventive dental care.
16. There will be an increased need for multilingual services in dental offices.
17. There will be an increase in complexities (language, regulations, mental status, etc.) regarding history-taking and medical-legal authorization for treatment.
18. Dentistry will continue to compete for the public's discretionary dollars.
19. There will continue to be differing views on social responsibility in the delivery of dental care.
20. If unmet, governments will demand that the profession meet the needs of the underserved.

21. There will be a need for increased cooperation within local dental communities to care for their underserved populations. Need for increased numbers of participating doctors.
22. Diet trends contribute to increased dental treatment and dental issues.
23. Difficult to maintain support for state-funded dental education programs in Oregon.

### **SCIENCE and TECHNOLOGY**

24. Because of increases in technology and scientific knowledge – delivery of care will be more efficient than in the past.
25. Technology and workforce cost increases will continue to go up.
26. Personality and marketing will continue to be promoted in continuing education.
27. Industry and media will continue to influence the profession.
28. The focus of media on dentistry increases demand.
29. Preventive medicine is a priority. This will increase the demand for dentistry.
30. Government regulations and public opinion will continue to be influenced by emotion rather than science.
31. There will be more medical information shared among health care providers.

### **GOVERNMENT and REGULATORY**

32. If we are able to expand fluoridation, it will have to be one community at a time.
33. Political and environmental concerns will continue to affect regulations imposed on the science-based profession.
34. If factors limit access to care, the government will intervene.
35. Unfunded and underfunded government mandates will continue to influence health care delivery.
36. There is a political force for the expansion of the scope of practice of the dental workforce.
37. Changes to licensure may open the profession to inadequately trained personnel.
38. Increased government regulation of the practice of dentistry will increase costs.
39. Internet access provides opportunities to educate and influence legislators.
40. Non-dental ownership of dental practices will continue to be an issue.
41. Single-payer initiatives will continue to be an issue.

### **BUSINESS and ECONOMIC CLIMATE**

42. Market factors may adversely influence the profession.
43. Qualified dental faculty will be more difficult to recruit.
44. There will continue to be an increase in the diversity of practice modalities and configurations.
45. Oregon will continue to be a difficult business environment.
46. Higher level of dental school graduate indebtedness.
47. There will be an increased demand on the profession to treat underserved populations.
48. Continued contentious relationships between providers and third party payers.
49. National health insurance may change all of the rules.

## 5-10 Year Planning Horizon: Mega Issues

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***Mega issues** are issues of strategic importance that represent challenges the ODA will need to face in defining the ultimate direction of its long-range plan. These issues represent potential impediments to achievement of the envisioned future and form a basis for dialogue about the choices facing us. These questions can also serve as an ongoing menu of strategic issues that the Board of Trustees can use to create regular opportunities for strategic dialogue about the issues facing the profession.*

### **Membership**

1. How do we increase membership market share?

### **Communication**

2. How do we best communicate and develop partnerships with all interest groups?
3. How do we best promote the work of the ODA, within the profession and to the public (branding)?
4. How can we utilize communications to increase transparency in our governance process?

### **Advocacy**

5. How can we maximize DOPAC grassroots participation and influence?
6. How do we efficiently advance the ODA legislative priorities?
7. How do we maximize influence with government agencies?
8. How can we become the authority for oral health information?

### **Leadership**

9. How do we identify and attract new leaders?
10. How do we develop, enhance and train existing leaders?
11. How do we assert ourselves as leaders of coalitions?

### **Governance**

12. How can we become more nimble with our governing bodies?
13. How do we increase volunteer participation?
14. How do we increase transparency in our governance process?
15. How do we stay informed and relevant to The ODS Companies, including board elections?

### **Workforce**

16. How do we accurately identify the oral health needs of underserved populations, identify barriers to meeting these needs and maintain a leading role in developing creative and effective workforce solutions to overcome these barriers to care?

## **3-5 Year Planning Horizon: Outcome-Oriented Goals**

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**Goals** are outcome-oriented statements that represent what will constitute the organization's future success. The achievement of each goal will move ODA towards the realization of its vision. The goals are not in any order of priority. Every goal will need to be accomplished if the organization is to fully achieve its vision.

On the following pages, each goal is accompanied by a set of (a) **objectives**, which represent key issues affecting ODA's ability to achieve the goal and articulate milestones against which to measure progress; and (b) **strategies**, which describe how ODA will commit its resources to make its vision a reality.

### **Goal 1—Leadership Through Advocacy**

Our advocacy efforts will be coordinated in a timely manner, effective and efficient manner in order to improve the oral health of the public.

### **Goal 2—Value and Benefit of Membership**

Current and future dental professionals will become members, based on the value and benefit of membership.

### **Goal 3—Adequate/Quality Dental Workforce**

ODA will provide leadership in maintaining an adequately trained workforce.

### **Goal 4— Public and Professional Education and Professional Competency**

ODA will be recognized as the preeminent resource for oral health information relevant to both the public and the healing professions

### **Goal 5 – Leadership Development**

ODA will develop leaders from its membership who facilitate accomplishment of association and community goals.

## Goal 1—Leadership Through Advocacy

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Our advocacy efforts will be coordinated in a timely manner, effective and efficient manner in order to improve the oral health of the public.

### Objectives

1. 100% of our state legislators have a meaningful member-dentist contact.\*
2. Educate members on the importance of political consciousness.
3. Strive to pass 100% of our Oral Health Agenda items.

*\*Priority objective in goal (11/7/09)\**

## Goal 2—Value and Benefit of Membership

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Current and future dental professionals will become members, based on the value and benefit of membership.

### Objectives

1. Increase market share to 75% in 2010.\*
2. Increase market share in the age demographic of 35-49.

*\*Priority objective in goal AND ODA Board of Trustees priority objective for 2009-2010 (11/7/09)\**

## Goal 3—Adequate/Quality Dental Workforce

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ODA will provide leadership in maintaining an adequately trained workforce.

### Objectives

1. Ensure the adequate size/distribution of the dental work force to meet the needs and demand for dental care in Oregon.
2. Keep and promote the dentist as the leader of the dental team.\*
3. Support educational programs in their efforts to provide diversity.

*\*Priority objective in goal AND ODA Board of Trustees priority objective for 2009-2010 (11/7/09)\**

## **Goal 4—Public and Professional Education and Professional Competency**

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ODA will be recognized as the preeminent resource for oral health information relevant to both the public and the healing professions

### **Objectives**

1. Enhance ODA's understanding of the public's perception of issues in oral health care.
2. Increase available information regarding Oregon dentists' philanthropic effort.
3. Increase public awareness of how we are advocates for oral health care.
4. Provide education in treating children from birth to 5 years of age.\*
5. Provide education in treating geriatrics.

*\*Priority objective in goal (11/7/09)\**

## Goal 5—Leadership Development

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ODA will develop leaders from its membership who facilitate accomplishment of association and community goals.

### Objectives

1. Train existing leaders to be better communicators.
2. Increase recruitment of new members and new graduates into the leadership path throughout the state.\*
3. Increase component vitality as measured by increased participation at staff council, BOT, HOD and other ODA events.
4. Broaden leadership involvement within ODA coalitions.

*\*Priority objective in goal (11/7/09)\**

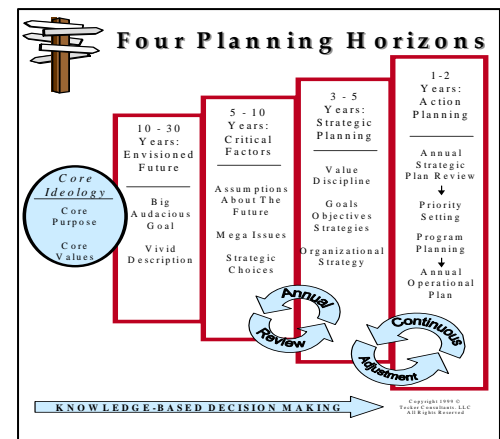
## About the Strategic Planning Process

ODA's strategic long-range plan describes a desired vision and what will be essential to achieving that vision. It is grounded in *core ideology* and driven by an *envisioned future* that realizes the full potential of ODA's ability to support its stakeholders and the industry. ODA's commitments are articulated in goals that declare the outcomes or attributes we intend to achieve. Objectives represent key metrics affecting ODA's ability to achieve the goal and articulate the direction in which these issues must be moved. Strategies will describe how ODA plans to commit its limited resources to make its vision a reality.

In the future, ODA will not be able to be all things to all people, but it must be different things to different people as the plan evolves to meet the needs of a constantly changing professional environment. Therefore, underlying this plan is the adoption of an ongoing process of planning and thinking strategically, designed to ensure relevance of direction and action over time.

In developing this strategic plan, a framework for planning was utilized, based on a model that organizes conversations about the future into four distinct planning "horizons." This framework will help ODA prioritize and execute outcomes as well as ensure the relevance of its long-range direction over time.

**Envisioned future.** The "four planning horizons" framework consists of crafting a comprehensive strategic direction based on the balance between what doesn't change (the timeless principles of the ODA's core purpose and core values) and what ODA seeks to become within a 10- to 30-year horizon; what would be possible beyond the restraints of the current environment. The 10- to 30-year horizon is characterized by the articulation of an envisioned future: a *big audacious goal* and a *vivid description* (what it will be like to achieve the goal).



**Critical factors.** The articulation of an envisioned future guides the ODA as we consider the factors that will affect our ability to achieve our goals. Building foresight about the 5- to 10-year horizon—assumptions, opportunities, and critical uncertainties in the likely relevant future as well as emerging strategic mega-issues—suggests critical choices about the potential barriers the organization will face. This foresight also suggests the responses that ODA will need to consider in navigating toward achievement of our 10- to 30-year goal.

**Strategic plan and operational planning.** The linkage continues into the 3- to 5-year horizon through the development of a formal long-range strategic plan, in which ODA articulates the outcomes it seeks to achieve for its stakeholders. How will the world be different as a result of what we do? Who will benefit and what will the likely results be? Further, the articulation of strategies will bring focus to ODA's annual operational allocation of discretionary resources. Action plans, checkpoints, and milestones will be

developed through a process of operational planning, indicating ODA's progress toward each goal in every planning year.

A strategic long-range plan is not intended as a substitute for an annual program or operating plan. It does not detail all the initiatives, programs, and activities the organization will undertake in the course of serving its membership and the dental industry, nor can it foresee changes to the underlying assumptions on which key strategic choices were based. Instead, the strategic plan identifies what ODA is not doing today, but must be doing in the future to be successful. Consequently, the strategic plan implies change; doing new things or doing more or less of current activities to ensure successful outcomes.

**Ongoing Re-evaluation.** Strategic planning for ODA should become the methodology for the organization's operations. If it is successful, this process will not have yielded a plan to be placed on the shelf, but will have served as a catalyst for the "process of planning strategically," at all times and at all levels throughout the organization. In order to achieve its vision, ODA must not look at strategic long-range planning as a one-time project that produces a milestone document of its best thinking at the moment. Instead, ODA must adopt strategic planning as an operational philosophy of ongoing re-evaluation of the critical knowledge bases that form the framework of its world, including:

- Sensitivity to member needs, insight into the future environment of the industry,
- Understanding of the capacity and strategic position of the organization, and
- Effective analysis of the ethical implications of policy and program choices.

ODA's strategic long-range plan represents a compass the organization will use to guide its work over the next five years. Each year of its life, the plan will be updated based on experience or new circumstances or as new opportunities or challenges emerge. In 2009, based on the annual reviews, ODA may author a new strategic long-range plan based upon the new environment expected to exist in a rapidly evolving world.