

# Chapter Sixteen

Ronald P. Desjardins, Jonathan P. Wiens, Sreenivas Koka, Charles J. Goodacre, and James C. Taylor

## Strategic Planning

All organizations must define their essential purpose or *raison d'être*. Organizations are defined by the development of their mission, goals, and objectives. Moreover, as internal and external events occur, organizations must become resilient and develop the appropriate leadership to guide the organization's course of direction. In 1956–57, the words “study,” “investigate,” “promote,” and “disseminate” were placed on the official Academy of Prosthodontics (Academy/AP) Seal. Those words are still appropriate today and serve as succinct goals and objectives. Since 1991, there have been five recorded events within the archives whereby the Academy addressed various aspects of its mission, goals, and objectives.

### Fellowship Survey

The initial approach to assess the Academy's mission took the form of a membership criteria survey conducted by the Fellowship Committee beginning in 1991. The survey questionnaire was developed by Drs. Dale E. Smith and Jonathan P. Wiens asking the fellowship (Life, Active, and Associate) to rank twenty-five different criteria for membership on a Likert scale of 1 to 5 (5 being the most important). The questionnaire was distributed to 110 fellows of the Academy with sixty-nine being returned for a 63 percent return rate. Although there was some variation in the response rate between the different categories of membership, there was an acceptable participation in each category of membership.

It was concluded from the survey that the most important criteria for consideration for membership in the Academy ranked in the following order: 1) personality, integrity, and demeanor; 2) professional prowess/clinical; 3) professional prowess/education; 4) advanced prosthodontic education; 5) professional prowess/research; and 6) diplomate of the American Board of Prosthodontics.

In response to the ranked membership criteria, the Fellowship Committee developed the Inreach Mentoring Program. Dr. Desjardins recommended that an Active fellow act as a mentor and coordinator for all the Associate fellows and serve as a consultant to the Fellowship Committee. The program was developed for the Associate fellows to learn about the operating methods of the Academy, the activities of the various committees, and the suggested protocol for presentations and the discussion of papers presented before the annual session. In the process, each Associate fellow was assigned a primary and secondary mentor to facilitate the processes. Based on this guidance, the new Associate

fellows would develop under the tutelage of those senior fellows, which is intended to guide them for future leadership and direction of the Academy. This is so special in that the collaboration between senior members and new Associates became critical to what values the Academy holds so close for its legacy and preservation.

#### Missions and Goals Workshop

On October 18–19, 1995, the Executive Council (EC) conducted a Mission and Goals Workshop in Crystal City, Virginia. The EC consisted of Academy Fellows Ronald P. Desjardins (president), Gerald N. Graser, James L. Lord, Edward J. Plekavich, Gary S. Rogoff, George A. Zarb, Howard M. Landesman, Richard J. Grisius, and George A. Murrell. In addition to the Council members, attendees included Drs. Brien R. Lang, William R. Laney, Kenneth A. Malament, John E. Rhoads, Clifford W. VanBlarcom, and Jonathan P. Wiens. The meeting was facilitated by Mr. Rene Topalian of Arcadia, California, a professional facilitator, who was able to understand the Academy's needs and focus discussions in a constructive manner.

The mission statement developed at that meeting was: “The Mission of the Academy of Prosthodontics is to provide key knowledge and leadership in prosthodontics.” To address this mission, the Academy will 1) be recognized as the ethical standard bearer for the specialty, 2) provide an advisory board to the prosthetic dental industry, 3) be the mentors to emerging prosthodontics leaders, 4) maintain and expand the Glossary of Prosthodontic Terms, and 5) present a premier prosthodontic meeting.

Goals were identified, which included maintaining and improving recognition for the scientific program, facilitating and nurturing leadership, achieving acknowledgment for the Community Outreach Program, impacting the manner in which prosthodontic service is delivered to the public, and providing the opportunity for the introduction of innovative technology with the provision of adequate resources to achieve these goals.

The workshop identified seven specific objectives that should be addressed by the Academy: 1) mentor Associate and Active fellows, 2) provide programs in scientific communication, 3) modify the structure and content of the annual program, 4) develop continuing education programs, 5) present health-care delivery systems information to the membership, 6) maintain and expand the current Outreach Program, and 7) maintain and expand the Glossary of Prosthodontic Terms.

These objectives were assigned to the appropriate Academy committee and progress was made in all areas except number 4. It was noted that there was considerable competition in the continuing education market. It was also noted that the annual program of the Academy was an excellent continuing education offering.

#### Strategic Planning Session I

In 2002, a Strategic Planning Committee (SPC-I) was appointed and charged with developing strategic options for an Academy “vision” and plans for pursuing this vision. The committee consisted of Drs. Charles J. Goodacre (chair), Stephen D. Campbell, David W. Eggleston, Gary R. Goldstein, Richard J. Grisius, Rhonda F. Jacob, Howard M. Landesman, William R. Laney, Lisa A. Lang, Thomas J. McGarry, George A. Murrell,

Stephen M. Parel, Gary S. Rogoff, Jonathan P. Wiens, Noel D. Wilkie, and George A. Zarb. The SPC met in advance of the 2003 Annual Meeting and reviewed previous planning activities and decided on an “appreciative inquiry” approach to addressing this matter. Appreciative inquiry decides what is working well within a group and identifies “energizing moments.” Planning is based on opportunities identified while maintaining important basic structure.

The SPC-I proposed a vision statement: *“The Academy of Prosthodontics serves the profession and the public through scholarship, fellowship and the advancement of scientifically based diagnosis and treatment.”* The Committee identified nineteen areas for Associate fellowship consideration but decided that most of those objectives could fit within two major categories: fellowship and scholarship.

The fellowship was asked to address two basic appreciative inquiry questions: 1) each fellow was asked to identify a time when they felt most involved with the Academy and why they felt that way, and 2) each fellow was asked to identify things about the Academy that should continue in perpetuity. Upon analysis of the responses, it was found that the responses did support the two major foci of fellowship and scholarship.

The SPC-I met again in October of 2003 and identified potential activities that could strengthen the foci of fellowship and scholarship. The fellowship was then queried as to the importance of these potential activities. It was determined that the most important items for consideration included identification/recruitment of new members, participation of all members in activities of the Academy, identification and use of the skills and interests of the fellows, and its function as a think tank. Important items included scholarship as membership criteria, relationships with senior members, and further development of the mentorship program. While research was deemed to be an important part of prosthodontics, the assistance with research protocols was thought to be less important compared to other activities.

The SPC-I concluded that 1) fellowship is an important foci of the Academy and future planning should include maintaining/strengthening fellowship; 2) scholarship is also an important foci of the Academy and future planning should include maintaining and strengthening scholarship; 3) service should be added as a foci to include items such as the Outreach Program, the Glossary, workshops, and mentoring; and 4) all fellows should be polled for suggestions of ways to improve/strengthen fellowship, scholarship, and service.

### Strategic Planning Session II

President Sreenivas Koka decided to include a strategic planning session in lieu of the first business meeting at the 2015 Annual Session. The goals of the SPC-II were to obtain input from the entire fellowship in a workshop fashion, as opposed to by a committee as in SPC-I, and to encourage their involvement in the Academy’s future direction and activities. This information would allow the Executive Council to be guided by the fellowship and develop an Academy “knowledge-based culture.” To prepare for this session, the Executive Council was asked to undergo a strengths, weaknesses, opportunities, and threats (SWOT) analysis in the fall/winter of 2014–15<sup>1</sup> to identify the strengths and weaknesses of the Academy and the opportunities and threats it faced.

An additional objective was to identify specific foci for all Academy fellows to address during the strategic planning session. The foci identified included education, fellowship, leadership, mentorship, research, and service. Past-Presidents Drs. Gerald N. Graser and Jonathan P. Wiens were tasked with leading the strategic planning session.

At the 2015 Annual Session, the fellowship was divided into eight groups with one specific fellow leading the discussion of each group. The group was asked to consider goals for each of the foci with the requirement that they fit the model of being “SMART” (specific, measurable, attainable, relevant, and time-bound). Discussion was encouraged from each member of the group and directed at each of the foci identified by the Executive Council. Each member of the group was then asked to rank each of the foci in order of importance followed by tabulation of the results.<sup>2,3</sup>

The rankings, from highest to lowest, were 1) fellowship, 2) scholarship/education, 3) mentorship, 4) leadership, 5) service, and 6) research. The results clearly identified fellowship as the number-one focus for the Academy. It was also observed that education, leadership, and mentorship received comparable rankings, so it was not possible to determine further levels of importance within those groups. Individual fellows were passionate about each foci, and further discussion should be considered to give future leaders of the Academy guidance as to the best directions to follow as envisioned by the fellowship.

The strategic planning sessions allowed a shared accountability. The fellowship and the EC were empowered by the process.



▲ Academy of Prosthodontics (AP) fellows during a Strategic Planning Session, round table breakout groups

### Centennial Strategic Session: “The Next 100 Years”

The Academy held a Centennial strategy session entitled “The Next 100 Years” on May 8, 2018, in the Sofitel Water Tower Hotel in Chicago. It was led by President James C. Taylor. Participation in the session included twenty-two past-presidents and the sitting Executive Council representing the future leaders of the Academy. The purpose of the session was to review the Academy’s past mission, goals, and objectives and to project the Academy’s future direction.

This session was a structured iterative discussion focusing on the following six themes:

1. *Why were we created?*
2. *What are we now?*
3. *Where should we be?*
4. *How do we get there?*
5. *When should we be there?*
6. *Who will get us there?*

There was significant rich discussion that brought out the incredible collective wisdom in the room, and the session went beyond its allotted four hours. This impassioned yet collegial conversation provided a body of thought that would inform the members of the 2018–19 Executive Council in their subsequent deliberations around a refresh of the Academy’s strategic plan that took place later in 2018.

▼ The Centennial Strategic Planning Session included the Executive Council and past-presidents of the Academy.



#### **REFERENCES**

1. Osita C, Onyebuchi I, Justina N. Organization's stability and productivity: The role of SWOT analysis. *Int J In App Res.* 2014;2:23-42.
2. Doran GT. There's a SMART way to write management's goals and objectives. *Management Review AMA Forum* 1981;70:35-36.
3. Drucker P. *The Practice of Management.* Harper, New York, 1954; Heinemann, London, 1955; Butterworth-Heinemann, 2007.