

Organizational and Operational Strategic Plan ICD-USA Section Membership Recruitment & Retention

Background Statement

I. Membership as Part of the Integrated Action Plan:

The USA Section of the International College of Dentists is currently implementing a strategic plan entitled “Integrated Action Plan”. That plan consists of five main goals. Each of these goals has multiple objectives, and they all are related directly or indirectly to the USA Section’s membership recruitment and retention.

The Integrated Action Plan’s 5 primary goals are as follows:

1. We are the preeminent honor society for dentists in the USA.
2. We are the foremost source of leadership recognition and development.
3. We are the model for domestic and international dental service and collaboration.
4. We have state-of-the-art internal and external communication to support our projects and activities.
5. We enjoy a secure financial position which allows us to achieve our strategic objectives.

Each of these goals requires a strong membership base. In short, membership is the “lifeblood” of the College.

The USA Section’s strategic plan is correctly called an Integrated Action Plan because it not only addresses long-term goals and strategies you would find as part of any strategic plan, but it also includes aspects of tactical and operational planning. In large organizations, planning is usually divided into three levels:

Strategic Planning- Strategic Planning is long-term planning that involves all of the organization’s management areas, and its content is relatively general and focuses on broad and long-lasting issues that insure the organization’s long-term effectiveness. Strategic planning is generally the responsibility of the organization executives.

Tactical Planning- Tactical planning is more specific and is usually limited to a single program or area of action within the overall organization. It is generally the responsibility of mid-level management staff.

Operational Planning- Operational planning is focused on achieving objectives and carrying out short-term immediate actions to accomplish the goals and objectives set out by strategic and tactical planning. These plans are generally carried out over a period of 1 year or less.

Operational planning answers the following questions:

1. WHO will carry out the action plan necessary to achieve strategic and tactical goals?
2. HOW will the action plan be carried out?
3. WHAT resources are necessary to carry out the action plan?
4. WHO will be responsible for monitoring the effectiveness of the action plan?

See references

The ICD-USA Section's Integrated Action Plan contains aspects of strategic, tactical, and operational planning. The plan is organized into the following areas:

- Goals
- Objectives
- Action
- Responsible party for the action
- Resources
- Systems necessary to accomplish the action
- Beginning and ending time period for the action to be completed
- Who is responsible for monitoring the progress of these actions

Those objectives within the Integrated Action Plan which specifically relate to membership are as follows:

Goal 1: We are the preeminent honor society for dentists.

Objective A: Re-establish a Standing Membership Committee

1.A.1: The Executive Committee will make recommendations to the Board to reestablish Membership as a standing Committee: This objective was completed at the 2016 Spring Board of Regents Meeting. The Bylaws were amended accordingly. The membership Committee then developed the committee's duties. Those duties are found in the ICD USA Standing Rules and are divided into those related to membership recruitment and those related to membership retention.. **This objective is complete.**

1.A.2: Compile good data. This objective is still ongoing. Our current membership database allows some correlation of data as a tool for making decisions relative to retention and recruitment: however, a new membership database software system is needed which would improve this process. **This objective requires further action.**

1.A.3: Develop a database that will support the membership queries. This dovetails into item 1.A.2, and the same comments apply. **This objective requires further action.**

1.A.4: Review current and future surveys focusing on membership. There is not currently a survey focusing on membership: however, we have developed an exit survey for those members who have elected to drop their membership. **This objective requires further action.**

1.A.5: Develop an integral and incremental dues payment option. This has already been done and can be accomplished under current operating systems. **This objective is complete.**

1.A.6: Review the current membership category formulas. This was the first task that the Membership Committee undertook after it was given Standing Committee status. The Committee formulated an amendment to the current Bylaws, creating a non-dues category, which is entitled "Life Emeritus Status," and allows for Fellows age 86 and older to apply for a non-dues status. This provided a pathway for Fellows to move from full dues (Active Fellowship status) to partial dues (Life Fellowship) to no dues (Emeritus Life Fellowship). That amended was approved by the BOR at its Fall 2017 meeting. **This objective is complete.**

1.A.7: Review the current Fellow nomination process. The membership committee believes the current system of *processing* recruited candidates for Fellowship using the online CIF works well. On the other hand, there is a need for a strategy to develop a uniform system of *recruiting* qualified candidates for Fellowship. A systematic plan for improving membership retention is also needed. **This objective requires further action.**

1.A.8: Support diversity in membership. This is an ongoing objective for the College (and now for the newly formed Standing Membership Committee). A new membership database system would help us determine our diversity ratios and should aid us in paying closer attention to this important issue. **This objective requires further action.**

Goal 5: We enjoy a secure financial position which allows us to achieve our strategic objectives.

Objective A: Increase net membership by 3% annually beginning with the 2017 class.

The current Integrated Action Plan calls for “champions, Deputy Regents, and the Deputy Registrar “to be responsible for implementing and monitoring this objective. The Membership Committee believes this goal also needs to be addressed as part of our committee’s duties. [Note: This objective was not met at the 2017. The number of inductees in the Atlanta class did not offset those members lost to death and resignations.]

This objective requires further action.

Objective B: Starting in 2017 have an induction class of 300-325 annually.

Comments for Objective A apply here as well. [Note: The 2018 induction ceremony will be in Honolulu, Hawaii. Although this is a desirable destination, the cost of travel to Hawaii may prove a challenge to achieving this objective.] **This objective requires further action.**

II. How the Membership Committee can support the Integrated Action Plan

In order to support the College’s Integral Action Plan (Strategic Plan), the USA Section Membership Committee is suggesting an organizational and operational strategy for the implementation of those goals that directly relate to membership improvement and retention.

This plan is **organizational** because it develops a framework for recruitment and retention. It is **operational** because it addresses WHO is responsible for carrying out the actions necessary to achieve membership goals, HOW membership goals will be achieved, and WHAT resources are necessary to achieve those goals.

When developing **operational** strategies, there are several points to remember:

- Those that set the goals known as the Strategic Plan are not necessarily those individuals that carry out the implementation of the action necessary to achieve those goals. As relates to ICD-USA Membership, the Executive Committee, Registrars, and Board of Regents may set the Strategic Goals; however, the WHO responsible for achieving the goals are the Deputy Regents and Counselors.
- Good communication between those setting the goals and those responsible for implementing the action necessary to achieve those goals is critical.
- Operational planning should be evaluated yearly and adjusted if necessary to adapt to changing environmental factors, such as generational influences and meeting location influences.
- Sufficient data must be available for those WHO are responsible for the operational actions. This data must be analyzed and monitored routinely to measure the success of

the HOW being implemented in the operational strategy and to determine areas that require future action.

- In operational strategic planning, it is important that those WHO are responsible for implementing the action plan understand completely the overall strategy and are in agreement with those goals. Those who are responsible for membership retention and recruitment need to understand HOW and WHEN they are to go about their task, but they are not necessarily responsible for whether or not those actions are successful. If the implementation does not result in the desired result, then the action plan would need to be reviewed and adjusted. That adjustment would be the responsibility of planning at the Strategic level.
- As pertains to the ICD USA, some of the organizational and operational structure can be considered “STANDING PLANS” which are defined as plans that are used to provide guidance for implementing actions for tasks that are periodically repeated in an organization. An example of a standing plan is the time frame for recruitment of new Fellows each year.
- The Operational Strategies must reflect and adhere to the core values of the organization. In the case of the ICD, the stated ICD mission, vision, and core values are listed below:

Mission: The USA Section of the International College of Dentists, as part of the preeminent honor society for dentists in the world:

- Recognizes and promotes leadership excellence with an emphasis on service
- Provides service to our Fellows and respect for our peers
- Addresses oral health needs and education throughout the world, and
- Fosters an atmosphere of collaboration with those who share our values

Vision: To be the leading IRA Dental organization providing service worldwide

Core Values: Integrity, Leadership, and Service

As relates to membership recruitment and retention, our Operational Strategy must maintain these principals. *Specifically, we must recognize that in an attempt to recruit and retain members, our standards for Fellowship cannot be compromised.*

III. Conclusion

Using this background information as a foundation, the Membership Committee proposes an Organizational and Operational Strategic Plan for Membership Recruitment and Retention. This plan would develop the following documents:

1. “An Organizational and Operational Plan for ICD-USA Membership Recruitment and Retention: Components of the Plan”

This would be the *key document* and it would provide a comprehensive operational plan designed to support the recruiting and retention goals outlined in the ICD-USA’s Integrated Action Plan. This plan will be structured around the following questions asked (and answered) when formulating an operational strategy:

WHO is responsible for carrying out this operational plan? Specifically, WHO is responsible for recruiting candidates for Fellowship and WHO is responsible for managing membership retention?

HOW will this operational plan be carried out? Specifically, this question is answered by development of systems and actions to be accomplished by those responsible within specified time frames.

WHAT resources are needed for carrying out this operational plan? Specifically, what tools will be need for those responsible for recruiting and retention of Fellows?

WHO will monitor the effectiveness of this operational plan? Specifically, who will be responsible for determining if recruitment and retention goals are being met and who will be responsible for adjusting the operation plan if necessary?

2. Operational Manual for Membership Recruitment and Retention

Once the operational plan has been adopted, the Membership Committee would develop a Manual outlining the plan with supporting references and resources. This manual would be available in hard copy and would also be a resource tool on the website. This manual will be used primarily for two purposes:

- As a training aid for individuals who are responsible for recruitment and retention. This would be disseminated to all Deputy-Regents and Counselors who are those primarily charged with that task.
- As a reference and standard on recruitment and retention for all ICD-USA leadership.

3. An Organizational Flow Chart of the Operational Plan

This is the least important of the proposed documents but could be a useful diagrammatic reference tool.

Submitted 1/5/2018 GRK

References

“Strategic Planning” David R. McClean, 2015

“Strategic Planning- A Pragmatic Guide” John H. Dobbs and John F. Dobbs, 2015