ADEA BFACA MEETING  
#BFACA16

2016 ADEA Sections on Business and Financial Administration & Clinic Administration

OCTOBER 5-8  
KANSAS CITY, MO
LETTER FROM THE CHAIRS

Welcome to the 2016 ADEA BFACA Meeting and to Kansas City—the City of Fountains, home of some of the world’s best barbecue, jazz legends and baseball greats. Last year’s meeting set a high standard for an entertaining, informative and interactive program and we hope to meet your expectations for the same this year. Our overall meeting theme of Leadership. Innovation. Technology focuses on addressing the everyday challenges we all face in maximizing scarce resources to meet the needs of our students and patients in the ever-changing world we live in.

We get off to a great start this year with keynote speaker Jason Young, a former senior-level manager responsible for delivering innovative training programs at Southwest Airlines. Jason will share lessons learned from his many years of experience in executive leadership and customer service to help you create a positive workplace culture that will result in a high-performance team, no matter what environment you work in. Following that is a series of presentations addressing financial viability, changing roles of faculty, and working with the dental equipment and supply industry. The first day finishes with a hallmark of our meeting—highly valued networking time during the Member’s Forum, tour of UMKC School of Dentistry, and a reception and dinner at the American Jazz and Negro Leagues Baseball Museums.

Day two begins with a clinical focus on interprofessional education with presentations on collaborative care models and integrated oral health delivery systems that will likely be part of our graduates’ future world. The morning finishes with presentations full of useful ideas from an innovative dental school clinic model and a look at using “lean principles” to maximize resources and improve quality of care. We will revisit the 2015 ADEA Survey of Dental School Clinic Finances in an effort better use the data to inform decisions on clinical curriculum and patient management. The day ends with the ever-popular EXPRESS-ions! presentations and breakout sessions. This year’s presenters focus on using technology and data to improve patient communication, financial decision making, and formative feedback systems.

On the last day we are extremely fortunate to have a panel of three dental school deans who have knowledge and experience related to the creative funding of often expensive educational and clinical technology. They will share lessons learned that can help you meet the technology needs of your institution. The meeting will close by addressing issues related to electronic health records. Learn how to make decisions about cloud-based technology and about the integration of dental and medical records, issues that come to the forefront as we all expand our off-site presence and seek to integrate health care with our colleagues in other disciplines.

A great location, informative and practical presentations with multiple “take home and use it on Monday” lessons, lots of networking opportunities, fine dining and unique tourist destinations—all these make for an experience you won’t forget. Thanks for attending, and enjoy!
OVERVIEW

In today's ever-changing and competitive world, all business, especially the business of dental education, faces challenges on multiple fronts:

- How do we best capitalize on limited financial and human resources?
- How can we effectively integrate expensive and rapidly obsolescent technology into our educational and clinical environments?
- When should we embrace change, and when should we stay the course?
- Is what we face at a particular moment in time a threat or an opportunity?

The “movers and shakers” of dental education at the 2016 ADEA Sections on Business and Financial Administration and Clinic Administration (ADEA BFACA) Meeting will find answers to these timely questions as they relate to the business, finance and clinic administration sides of dental education. The meeting will feature:

- Stabilizing financially unsustainable clinical education programs.
- How to apply business and learning models to facilitate the adoption of change in dental education.
- Successful models of interprofessional clinical practice.
- An innovative clinic model to maximize both educational outcomes and clinic revenue.
- Data-driven decision-making principles to improve the clinic bottom line.
- EXPRESS-ions! brief presentations on current hot topics in dental education.
- Obtaining and sustaining technology in dental education.
- The cloud, integrating medical and dental records and design and use of the EHR.

The 2016 ADEA BFACA Meeting will include an insightful panel discussion with dental school deans who will share ideas for maximizing technology in the clinical and educational settings. The robust agenda has been organized to provide ample time for networking, and there is sure to be something for everyone—from our community of business and clinical administrators to all current and aspiring leaders in dental education.
LEARNING OBJECTIVES

At the conclusion of the meeting, attendees will be able to:

- Apply basic business principles to management of practice systems to increase efficiency and income of predoctoral, advanced and faculty practice clinics.
- Identify dental school cultural impediments to change and move new ideas from acceptance to adoption.
- Make smart decisions about acquiring, implementing and sustaining technology in dental education.
- Describe several successful models of interprofessional clinical practice.
- Develop a marketing plan to increase patient flow.
- Employ technology to gather and display data that can be used to improve clinical performance.
- Understand cloud services and EHR design, utilization and integration with medical records.

WEDNESDAY, OCTOBER 5

4:00 – 6:00 p.m.
Seville Foyer
Registration

4:00 – 6:00 p.m.
Seville Ballroom
ADEA Corporate Meet and Greet and Welcome Reception
Don’t miss the opening reception for a networking opportunity with our corporate sponsors. We will also recognize and welcome our first-time attendees and help them navigate the meeting.

THURSDAY, OCTOBER 6

7:00 – 8:00 a.m.
Seville Ballroom
Networking Breakfast

8:00 – 8:15 a.m.
Grand Ballroom
Welcome and Introductions

**David Lazarchik, D.M.D.**
Chair, ADEA Section on Clinic Administration; Associate Dean for Patient Care and Clinical Education, Western University of Health Sciences College of Dental Medicine

**Jeff Primos, M.B.A.**
Chair, ADEA Section on Business and Financial Administration; Director of Business Affairs, University of Missouri – Kansas City School of Dentistry
8:15 – 9:30 a.m.  
Grand Ballroom

Keynote Address:  
Leading Smart the Southwest Way

Sponsored by KaVo Kerr Group – Consumables, KaVo Kerr Group – Equipment and KaVo Kerr Group – Imaging

Jason Young  
Owner, LeadSmart, Inc.; Partner, BESTWORK USA

Southwest Airlines has given the business world a textbook example that providing fabulous customer service and maintaining high employee morale in a low-cost environment is possible—and indeed profitable in corporate America today. As a key developer of Southwest Airlines’ legendary customer service and leadership training programs, Mr. Young knows that great culture does not “just happen.” In this presentation, he provides practical, easy-to-implement guidance to the key determinants that make a healthy, productive and profitable culture in any team or organization. Participants will learn how great leaders develop, motivate and empower people to achieve extraordinary results through shared values, shared vision and shared efforts. They’ll learn how to lead in the midst of change and develop teams toward alignment and innovation. Participants will walk away with a thorough understanding of what it means to deliver high-performance leadership.

9:30 – 10:00 a.m.  
Grand Ballroom Foyer

Networking Break

10:00 – 10:45 a.m.  
Grand Ballroom

How to Upright a Sinking Ship! Moving an AEGD Program From Financial Disaster to Success

William Sands, D.D.S.  
Assistant Professor, University of the Pacific, Arthur A. Dugoni School of Dentistry

Fiscal responsibility is an important concept underlying all dental education clinical enterprises. Dugoni School’s AEGD residency program, a stand-alone satellite facility, had drifted severely into the red, financially. Practice systems were lacking, overhead was poorly controlled and productivity was declining. Predoctoral tuition supported the program, an unsustainable practice given the institution’s commitment to minimize increases to predoctoral tuition. The dean provided a clear directive with annual goals over three years. If these goals were not achieved, it would be necessary to close this otherwise excellent and established program. Actions called for included conducting a thorough evaluation, establishing clear strategies, building urgency, creating a new vision and commitment statement, and implementing new protocols for all aspects of the program’s operations. Clear and accurate prioritization of practice management skill-building and business policy needs, business case presentations, shared OKR (Objectives and Key Results), and improved financial arrangements and scheduling were imperative. The lessons learned, which resulted in turning this program around, can be used in many areas when major changes must be made. The program has exceeded the first-year goals for an improved net and is looking forward to year two of this challenge.
10:45 – 11:15 a.m.  
Grand Ballroom  

Why Faculty Members Are Resistant to Change: The Predicament of Modern Education

Rita Parma, D.D.S.  
Director, International Dentist Education Program, University of Texas Health Science Center at San Antonio School of Dentistry

Constant change is a business reality and organizations must continually adapt to stay competitive. Dental schools are no different. A key aspect that determines the likelihood that a major change will succeed or fail is an understanding of the organization’s culture and the impediments to change. This presentation will discuss the results from a survey of dental school faculty and physical therapy faculty that explored the fears and concerns faculty have about innovative, evidence-based technological curriculum change. The goal is to foster an open discussion of how to best work within a dental school’s culture and strategies found in business and learning models that can help with changing culture and adoption of change.

11:15 – 11:45 a.m.  
Grand Ballroom  

CRET Innovation Center—How Dental Industry and Dental Schools Can Work Together to Improve Dental Education

Edward F. Rossumando, D.D.S., Ph.D.  
Professor, Department of Craniofacial Sciences, University of Connecticut School of Dental Medicine

James B. Trotter, D.D.S.  
Clinical Assistant Professor, Director, Dr. Charles Dunlap Innovation Clinic, University of Missouri - Kansas City School of Dentistry

The Center for Research & Education in Technology (CRET) has partnered with two U.S. dental schools to open Innovation Clinics that provide dental students with the latest technology. The presentation format is a panel consisting of representatives from CRET and the University of Missouri - Kansas City School of Dentistry (UMKC SOD). CRET representatives will give an overview of how dental schools can work with CRET to implement and help spur clinical innovations and ensure that students can access the latest technology. UMKC SOD staff will discuss how the program was integrated in the curriculum and the outcomes since the center opened.

11:45 a.m. – noon  
Grand Ballroom  

Q&A

Noon – 1:30 p.m.  
Seville Ballroom  

Networking Lunch and ADEA Sections on Business and Financial Administration and Clinic Administration Members’ Forum

Sponsored by The Procter & Gamble Company
Tour of University of Missouri – Kansas City School of Dentistry

The UMKC SOD opened in 1881 as the Kansas City Dental College. The name may have changed as the school has grown and evolved into a multi-faceted institution, but it has maintained a tradition of excellence in education and clinical care for more than a century. The school offers a varied and complete range of educational programs for students of dentistry and dental hygiene, as well as for graduate, advanced education and continuing education students. With exceptional students, faculty, facilities and alumni, the UMKC SOD is poised to make its second century of service to the dental profession as successful as its first.

Transportation will depart from the hotel promptly at 1:45 p.m. and will depart from the dental school no later than 3:30 p.m. Space is limited—advanced registration is encouraged.

Offsite Networking Reception and Buffet Dinner

Transportation will depart from the hotel promptly at 4:00 p.m. and will depart from the museums at 6:30 p.m.

American Jazz and Negro Leagues Baseball Museums
Co-sponsored by A-dec and Hu-Friedy Manufacturing Co., LLC

FRIDAY, OCTOBER 7

Networking Breakfast

Welcome and Introductions

Interprofessional Education and Collaborative Practice: The Role of Dentistry

Marsha Pyle, D.D.S., M.Ed.
Dean, University of Missouri – Kansas City School of Dentistry

Leo E. Rouse, D.D.S., FACD
ADEA Senior Scholar in Residence

Interprofessional education (IPE) is a collaborative approach to developing health professions students into future interprofessional team members. In 2009, an expert panel focused on IPE developed four core domains: Values/Ethics, Interprofessional Communication, Roles and Responsibilities, and Team Building. The presenters will focus on the integration of predoctoral students into IPE collaborative care models, review and discuss existing models that are working, present challenges in developing such models of care, and review the economic implications for dental education institutions, including the care financing challenges and how to overcome those challenges.
9:15 – 9:45 a.m.  
**Grand Ballroom**

**Integrating Oral Health Practice: An Overview of Integrated Oral Health Delivery Systems and the Essential Skills Needed for the Future Dental Workforce**

*Michael Plunkett, D.D.S., M.P.H.*  
*Associate Director for Strategy & Business Development, Permanente Dental Associates; Assistant Professor of Community Dentistry, Oregon Health & Science University School of Dentistry*

The presentation will review the essential operational components of integrated oral health delivery systems as well as the core skills needed for a provider to excel in an integrated health workforce. Specific topics will include the use of quality outcome metrics in practice at both the individual patient and population levels, integrated health record systems and team-based care that coordinates across multiple departments. Finally, the session will address the critical role of the educational environment in shaping the future dental workforce.

9:45 – 10:15 a.m.  
**Grand Ballroom**

**Achieving Dental School Clinic Effectiveness—The Balance Among Education, Patient Care Management and Revenue**

*Khanh P. Chu, D.D.S., M.A.*  
*Assistant Dean of Clinical Education, Arizona School of Dentistry & Oral Health*  
*Ellen Crean, RDH, M.S., D.D.S., Ph.D.*  
*Chief Medical Officer, Triton Medical Solutions, LLC*  
*Herb Kaufman, D.D.S.*  
*Associate Dean of Clinical Operations, Arizona School of Dentistry & Oral Health*

Dental school clinic operations have been faced with challenges that can affect patient care management, education and revenue cycle management. This presentation will explore the concepts of a partnership approach to clinic management, implementation of an insurance-based clinic model and a student group practice model, and financial incentives to provide access to care for patients. Implementing these concepts at the Arizona School of Dentistry & Oral Health has resulted in a patient-centric clinic with a comprehensive patient care approach for students to model. Maximizing medical and dental insurance billing and individual patient payment plan options has increased patients’ access to care and provided a variety of complex treatment experiences for students. Creating a clinic environment that balances patient care management and education has driven an increase in clinic revenue and productivity, resulting in improved care for patients, more experience for students, an accelerated demonstration of competency, and assistance with the clinical licensing exam process.
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<td>Break</td>
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| 11:00 – 11:30 a.m. | Maximizing Clinic Net Revenue             | Grand Ballroom                    | **Bryan Cook, Ph.D.**  
ADEA Senior Vice President for Educational Research and Analysis  
**John Reinhardt, D.D.S., M.S., M.P.H.**  
Professor, University of Nebraska Medical Center College of Dentistry  
This presentation will provide guidance and stimulate discussion on how dental schools can better use data to drive decisions on clinical curricula and patient management to maximize clinical revenue. Specifically, the results of the 2015 ADEA Survey of Dental School Clinic Finances will provide the foundation for this presentation. Data collected include clinic curricular model, clinic revenue by patient source, number of clinic FTEs and number of clinic procedures completed and their fees. |
| 11:30 a.m. – noon | Designing Lean Principles in a Dental Care Environment | Grand Ballroom                    | **John McIntosh, M.P.A.**  
Assistant Dean for Clinical Administration & Revenue Cycle Management, New York University College of Dentistry  
Hospitals are increasingly turning to “lean principles” to help maximize their existing resources, improve the quality of patient care and safety, eliminate medical errors, decrease delays and reduce the length of patient stays in hospitals. The economic challenges facing dental providers today makes the quest for quality oral care services an absolute necessity. One overarching goal of lean principles in health care is to eliminate the amount of time spent on non-value added activities in the delivery of perfect patient care. This presentation will discuss how implementing lean principles in oral care results in the reduction of dental administrative costs, a better patient flow, increased participation by the workforce in process improvement activities and high employee retention rates. |
| Noon – 1:30 p.m.  | Networking Lunch                           | Seville Ballroom                  |                                                                                                                                                                                                       |
EXPRESS-ions!

This session will consist of six five-minute presentations on current hot topics in dental education as they relate to business, financial and clinic administration. Presenters will share experiences from and lessons learned at their home institutions and how attendees can apply them to their standard practices. At the conclusion of all presentations, participants will engage in three rounds of small group discussions led by the EXPRESS-ions! presenters. Attendees will have the opportunity to ask more in-depth questions and explore solutions to matters taking place at their home institutions and beyond.

Embracing Social Media: Should We Like It, Check-in, Share, Follow or Tweet?

Kimberly Ruona, D.D.S.
Assistant Professor, University of Texas School of Dentistry at Houston

Marketing a Dental School-Based Clinic

Todd Thierer, D.D.S., M.P.H.
Associate Dean for Clinical Affairs, University of Minnesota School of Dentistry

Integrating Formative Feedback Into Student Assessment: iFF There is a Problem, You Can Fix It!

Hubert Chan, D.D.S.
Assistant Dean for Clinical Education, Western University of Health Sciences College of Dental Medicine

Alexander Lee, D.M.D.
Coordinator of Dental Informatics, Western University of Health Sciences College of Dental Medicine

Monthly Metrics in Clinical Performance

Kim Jacobs, M.H.A.
Financial Data Analyst, Virginia Commonwealth University School of Dentistry

Using Qualtrics to Evaluate Quality

Suzanne Adolphson, M.S.W., M.H.A.
Director of Patient Care Services, Dental Center, Western University of Health Sciences College of Dental Medicine

Using Business Intelligence Tools to Analyze Clinic Data

Steve Stefanac, D.D.S., M.S.
Senior Associate Dean, Clinical Affairs, Patient Services, University of Michigan School of Dentistry
3:00 – 4:00 p.m.
Grand Ballroom and Roanoke Room

**EXPRESS-ions! Breakouts**
Attendees will engage in the breakout discussions of their choice led by the EXPRESS-ions! presenters.
Round 1: 3:00 – 3:30 p.m.  Round 2: 3:30 – 4:00 p.m.

4:00 – 4:30 p.m.
Grand Ballroom

**Get Involved With ADEA BFACA!**
Every successful organization requires an active membership to achieve its goals. Not everyone is able to step up to an officer role. However, service in such a position is a wonderful way to get more involved, work with a great group of BFACA officers and ADEA staff, have a direct voice in the organizational activities of our section (such as planning the annual meeting) and give back in return for those who led before us. If you think you would like to serve as an officer, or are just curious about what’s involved, please join the current BFACA leadership team for a brief discussion about how to take the next step in influencing the direction of dental education. The rewards far outweigh the investment of time and effort.

5:00 p.m.

**Dinner on Your Own**
Attendees will have the opportunity to dine with colleagues to foster and continue engagement within the BFACA community. Please be sure to sign up in the registration area, during the meeting, to dine with your colleagues.
**SATURDAY, OCTOBER 8**

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<td>How Do We Obtain and Sustain Technology in Dental Education?</td>
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How Do We Obtain and Sustain Technology in Dental Education?

**Cindy Amyot, Ed.D.**  
Associate Dean, Instructional Technology and Faculty Development,  
University of Missouri - Kansas City School of Dentistry

**Cecile Feldman, D.M.D., M.B.A.**  
Dean, Rutgers, The State University of New Jersey, School of Dental Medicine

**John Valenza, D.D.S.**  
Dean, University of Texas School of Dentistry at Houston

**John Williams, D.M.D., M.B.A.**  
Dean, Indiana University School of Dentistry

The long-standing commitment to technology in education has improved and enriched the lives of students of every age. Studies have shown that technology-rich learning environments are the perfect place for individualized, self-paced learning that engages the student and encourages active participation through critical thinking and problem-solving skills. Our students have experienced the benefits of this educational model and have an expectation that we will continue to provide more opportunities for learning with virtual patient simulations, online course work and videos, and current technology in CADCAM and lasers. With limited federal funding and dwindling state budgets, there is a growing concern for obtaining and sustaining the financial resources for such an investment. Our panelists have placed a high priority on technology in their home institutions and will discuss their experiences in gaining financial support for and a continued commitment to providing the educational technology our students require.
10:15 – 10:45 a.m.  
Grand Ballroom

What Is the Hype About the Cloud?

**Lynn Johnson, Ph.D.**  
*Professor and Associate Dean of Faculty Affairs and Institutional Effectiveness, University of Michigan School of Dentistry*

Cloud computing is impacting dental education and its missions of teaching, research and patient care. At the center of this change is Internet2, a community of 270 higher education institutions that collaborate to solve complex technology problems for the good of the community. The foundational values of Internet2 are for higher education institutions to work together to create opportunities that none can take advantage of independently. The presentation will describe how Internet2 operates and its formal processes. Participants will learn the lessons dental schools have learned (increased efficiencies and security and decreased IT infrastructure) as they have worked with Internet2 to move some of their IT operations to the cloud. By moving more and more services to the cloud, we can transform operating resources and grow capacity to advance science, education and patient care.

10:45 – 11:15 a.m.  
Grand Ballroom

Integrating Medical and Dental Records for Patient Care

**Maria Guerra, M.B.A.**  
*Operations and Finance Manager, UCSF Dental Center, University of California, San Francisco, School of Dentistry*

**Sean Mong, D.D.S., Ed.D.**  
*Clinic Director, University of California, San Francisco, School of Dentistry*

This presentation will share information on the complexity and challenges of integrating information from Epic with axiUm. Project approaches, best practices and future plans on the electronic health record integration at UCSF will also be discussed.
11:15 a.m. – noon
Grand Ballroom

**Designing and Utilizing the Electronic Health Record**

**John McIntosh, M.P.A.**
*Assistant Dean for Clinical Administration & Revenue Cycle Management, New York University College of Dentistry*

**Mark Wolff, D.D.S., Ph.D.**
*Professor and Chair, Department of Cariology and Comprehensive Care, New York University College of Dentistry*

Most dental schools use electronic health records (EHR) to facilitate patient care and patient financial management. Frequently, dental schools adapt their patient care and business processes to follow the predefined functions of the EHR. It is possible, through customization of the EHR with triggers, scripts and reports, to develop an EHR that enhances the dental care center’s functions. This presentation will focus on how to identify management issues that plague all administrators, identify key elements of the problematic issue, determine the best methods to capture the data from the EHR, design novel EHR solutions to support workflow, and design the follow up to close the loop and ensure compliance. This presentation will use a series of actual clinical examples, such as management and tracking of implantable materials, management of managed care treatment plans/programs and financial planning on treatment plans.

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Noon
Grand Ballroom

**Wrap-up and Farewell**
The American Dental Education Association is an ADA CERP Recognized Provider.

ADA CERP is a service of the American Dental Association to assist dental professionals in identifying quality providers of continuing dental education. ADA CERP does not approve or endorse individual courses or instructors, nor does it imply acceptance of credit hours by boards of dentistry.

The American Dental Education Association designates this activity for 11 continuing education credits.

Continuing education (CE) credit is awarded for participation in individual designated educational sessions and not for overall 2016 ADEA BFACA Meeting attendance.

All speakers agree that neither they nor members of their immediate family have any financial relationships with commercial entities that may be relevant to their presentation.
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Dental Services Group–The Laboratory Network