

Treasurer Curriculum Vitae Form

ADA American Dental Association®

America's leading advocate for oral health

211 East Chicago Avenue
Chicago, Illinois 60611

The ADA Treasurer Curriculum Vitae Form should be completed in its entirety. If additional space is required, attach extra pages with the same section titles and in the same order. Although it is permissible to attach an existing curriculum vitae, the use of "see attached CV" in any section is discouraged. In accordance with the Governance Manual, this document will be distributed to the members of the House of Delegates at least 60 days prior to the convening of the House. No other candidates shall be nominated from the floor of the House.

11/2020

American Dental Association

Treasurer Curriculum Vitae Form

Name: **Peter C Shatz, DDS**

PERSONAL INFORMATION	Date: 10/29/2023
Office Address: 3737 Upland Drive	Phone: 678-773-1699
Marietta, GA 30066	Fax: N/A
	E-mail: DrShatz@PeriodontalServicesOfG eorgia.com
Home Address: 3737 Upland Drive	Phone: 678-773-1699
Marietta, GA 30066	Fax:
	E-mail: PeterShatz@gmail.com

EDUCATION	Year	Degree
College: McGill University, Montreal, QC, Canada	1987	B.Sc.
Dental School: McGill University, Montreal, QC, Canada	1992	D.D.S.
Dental Specialty Training: Louisiana State University, New Orleans, LA (Periodontics)	1995	Certificate
Other: SMBD Jewish General Hospital, Montreal, QC, Canada	1993	G.P.R.
Louisiana State University Shreveport, Shreveport, LA	2024 (expected graduation)	M.B.A.

LICENSURE	State	Year
Dental	GA	1995
Sedation	GA	1995

ACADEMIC or PROFESSIONAL APPOINTMENTS (Location)	Rank	Year(s)
Teaching:		
Dental College of Georgia, Augusta, GA	Ass't Clinical Prof	1995-2012
Research:		
SMBD Jewish General Hospital, Montreal, QC, Canada	Research Ass't	1997-1998

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PROFESSIONAL SOCIETY MEMBERSHIPS (excluding ADA)	Offices Held
American Academy of Periodontology	N/A
Georgia Dental Association (GDA)	Vice-President (2024)
Northwestern District Dental Society (NWDDS) (Georgia)	Editor, Treasurer, President
Alpha Omega Dental Fraternity	Editor, Treasurer, President
Hinman Dental Society	

DENTAL PRACTICE (location)	Dates
Kennestone Periodontics (Atlanta, GA)	1995-2016
Dental Care Alliance (Roswell, GA)	2017-Present
Great Expressions Dental Centers (Marietta, GA)	2022-2023
Midtown Smile Center	2023-Present
Pacific Dental Services	2023-Present
Periodontal Services of Georgia	2022-Present

HONORS and AWARDS
McGill University – Graduated with Distinction.
Alpha Omega Dental Fraternity – Academic excellence.

COMMITTEES—DENTAL ORGANIZATIONS (including ADA)	Dates
ADA – Advisory Committee on Annual Meetings	2019-Present
ADA - Committee on Dental Education & Licensure	2020
GDA - Trustee	2018
GDA – Finance Benefits Audits (Chair 2022)	2010-2014, 2018-Present
GDA - Building Renovation	2019-Present
GDA - Innovation task force (chair)	2020-Present
GDA - PR committee	2018-Present

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OFFICES HELD—DENTAL ORGANIZATIONS (including ADA)	Dates
GDA – Governmental Affairs Committee	2022-Present
GDA - 3 rd party payor task force (chair)	2019-Present
GDA - Redistricting task force	2022-Present
GDA - ADA delegation (chair 2020-2021)	2017-Present
NWDDS - Editor	2007
NWDDS - Secretary	2008
NWDDS - Treasurer	2020
NWDDS - President	2019

PRESENTATIONS—LOCAL, STATE, NATIONAL (list five most recent)		
Topic	Society	Date
1. Dental Implant Diagnosis, Treatment Planning and Placement.	Dental Care Alliance	10/23/2021
2. Current Concepts in Implant Dentistry. Doing more with less.	Central Florida District Dental Society	04/30/2021
3. Current Concepts in Implant Dentistry. Doing more with less.	Georgia Dental Association	09/24/2021
4. Socket Preservation, Atraumatic Extraction, Guided Bone Regeneration.	Dental Care Alliance	02/06/2020
5. Minimally Invasive Sinus Surgery & Computer Guided Implant Placement.	NeoBioech Implant Company.	03/07/2020

ARTICLES PUBLISHED (list three most recent)
1. Kurtzman GM, Silverstein LH, Shatz PC. Implant Therapy: Sequence of Surgical and Restorative Phases. Dental Collaborations, pp. 4-8 , Spring 2005.
2. Kurtzman GM, Silverstein LH, Shatz PC, Kurtzman D. Suturing for Surgical Success. Dentistry Today, Vol.24 No. 10. pp, 96-103. October 2005.
3. Silverstein LH, Shatz PC. Instrumentation For Modern Day Implant Surgery. PPAD. P.9, Winter/December, 2005

PREVIOUS FINANCIAL and BUDGET EXPERIENCE (including the ADA)
American Dental Association – Advisory Committee Annual Meetings (2019-Present, Chair 2024)
Georgia Dental Association – Finance, Benefit & Audit Committee (2010-2014 & 2018-Present), Chair (2022-Present). ADA Delegation (2017-Present, Chair 2021)
Northwestern District Dental Society – Treasurer (2020), President (2019), President Elect (2018), Vice President (2017), Secretary (2016).
Periodontal Services of Georgia, LLC – Owner (2022-Present)
Kennestone Periodontics, PC – Owner (1995-2016)
Cobb County Composite Squadron, Georgia Wing, Civil Air Patrol – Deputy Commander (Seniors) 2017-2021, Finance Committee (2017-2021)
Alpha Omega Dental Fraternity – President (2008), Treasurer (2006)
Sabra Riders Motorcycle Club – Treasurer (2013-2015)

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Describe your background in finance and any service in roles such as: Treasurer of a constituent society or specialty organization; member for two or more years of a Finance Committee or Audit Committee of a constituent society or specialty organization; member of a board of directors of a for-profit corporation or for-profit subsidiary of a constituent society or specialty organization; or any other position(s) providing comparable experience.

I am currently enrolled in the Louisiana State University, Shreveport, MBA program (completion 03/2024). I am proficient with excel, R and Quickbooks.

At the Georgia Dental Association, I have been on the Finance, Benefits & Audit committee 2010-2014 & 2018-present. I have been its chair since 2022. I have worked along side the Executive Director and CFO analyzing the internal forecasting and finalizing the budget. The process employed is mission based. I am also involved in the analysis of contracts for endorsed partners and their financial impacts. In this role I report to the Board of trustees, the House of Delegates and to the membership at large.

I have been Treasurer of the NWDDS, setting the preliminary budget & forecasting then finalizing the budget with the district executive committee. Responsible for A/P, A/R, reconciliation and quarterly reporting.

I have also been on the Georgia Wing of the Civil Air Patrol Cobb County Composite Squadron's finance committee setting forecasts and budgets. Additionally I was an Incident Commander and Director of Operations for Group 1. This role impacted 6 squadrons, 5 aircraft, 10 vehicles and about 125 volunteers. Again setting, at the mission level, budgets, expense tracking, reconciliations and reporting to Georgia Wing Command and the United States Air Force Liaison office.

I have also owned Kennestone Periodontics, a multi-location, privately held specialty dental group. Over time we had up to 5 Periodontists, 8 Hygienists and 20 support staff over 4 locations. I prepared the forecasting, marketing, budgets and monthly finance reports. I reported to the equity partners.

Describe your experience with the ADA budget process and finances, including any experience gained from serving as a delegate, trustee, council member or similar service.

I have been a Delegate or Alternate Delegate to the ADA House of Delegates since 2017. During that time I have been interested in the finances of the ADA. I have chaired the Georgia delegation and have chaired the Reference committee A workgroup in the 5th TD. I have seen how the budget has been presented to the house, I have met many times with the ADA CFO and have met with the ADA finance department as part of the Georgia dental association. I have become familiar with the account reporting process and can visualize the cashflows within the ADA. Moving forward, the Board of Trustees will have the budget and the process will be managed through the Strategic Forecasting Committee. I will discuss my opinion on this later on in this document. However, in short, the traditional finance methodology has changed, and the House has yet to see the impact.

As a member of the Advisory Committee on Annual Meetings (CAM), I have served as a general member, Continuing Education Chair (2022) and General Chair (2024). I have also been the liaison to the Sponsorship and Exhibit departments. Overall, the annual meeting budget is closely held by ADA staff and little information is given to the volunteers. The only budget item the volunteers have control over are the admission prices meeting attendees pay to attend the meeting. As a CAM member, we are only given "big bucket" revenue and expense numbers. As meeting chair, I am extremely aware of budget needs and have worked closely with ADA employees and our Board representatives. I am aware that mission based accounting is in play with the SFC and that the annual meeting budget is to be set by 01/2024. I am also aware of the structure of the Annual Meeting ADA team, their budget process and their reporting process. Lastly I am aware of the financial position of SmileCon based on revenue, sponsorships, exhibits, and expenses.

Explain how you plan to assist in interpreting Association finances and effectively share financial information with the House of Delegates and membership.

My personal strength has been the ability to look at a complex process, analyze its components and be able to easily explain the process at a level understandable by whatever stakeholder I am reporting to. In the Civil Air Patrol this ranged from maintenance people, search crews, Wing Command and the Air Force liaison officer. In my roles within the Georgia Dental Association and its tripartite components, I have been able to communicate the position of the organization at any time.

Be it through osmosis sitting on various finance positions at the GDA and NWDDS since 2010, mentoring by the former GDA CFO and former Executive Director, and via my formal education during the MBA, I have developed a tactical sense of finances. I have had a front row seat in where the GDA went from near insolvency to financial stability with investments of its excess revenue.

What matters is not where a financial position may be, but rather the WHY a financial position exists. Pages of financial reports marginalize individuals and don't adequately inform them of the ADA's financial health. My role of treasurer towards the ADA membership would be to tell the story of our finances, strategy, outcomes and reactions. This would improve engagement by our members and improve their situational awareness.

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What experience in dental association service, dental practice, dental education or private business would qualify you to serve as treasurer of the American Dental Association? What special skills or knowledge do you offer? (250 words or less)

Through the course of my financial involvement in the Georgia Dental Association, the Northwestern District Dental Association, multi-location group practices and the Civil Air Patrol I have worked closely with the various individuals which make up a team. I have worked in decision making roles with owners, vendors, customers, accountants, comptroller's, CFO's, attorneys, consultants, IT designers and implementors and many other professionals who touch the finances of enterprises, corporations, the military and the government. Each of these interactions were learning experiences. I went from the proverbial student, understudy to colleague. Forecasting, budgeting, reporting (balance sheets, income statements, cash flow statements, shareholder equity statements), policy making, meeting with stakeholders, contracting are familiar processes. I have even come to understand stylistic variations of these processes, depending on the individual or business doing the reporting.

My volunteer leadership within the Civil Air Patrol has taught me team building, leadership and a clear understanding of the chain of command.

Beyond casual knowledge gained by "being in the room", I have been mentored by CFO's and experienced leaders. I am also going to complete my Masters of Business Administration in March, 2024. I am proficient with excel, R and Quickbooks.

Why do you want to be the ADA Treasurer? What do you hope to accomplish?

My interest in the financial operation and management of the American Dental Association (ADA) began when I was appointed to the 5th trustee District delegation to the ADA's House of Delegates. Growing my involvement at the local to state level was my training ground. I became intimately familiar with the inner workings of the Georgia Dental Association (GDA). Beginning in 2010 I saw how the volunteer treasurer can have direct impact on the finances. I helped guide the financial recovery from the brink of collapse to the pinnacle of success. I saw how consistent, diligent and responsible management of the GDA was indeed the role of the treasurer. My time in these positions extends decades.

My experience at the state level mirrors what I see today at the ADA level. Loss of market share, loss of revenue, expansion of scope, expansion of structure and great reliance on the use of reserves to run the organization are all events I have witnessed in Georgia. I have been passionate about promoting a system that leads to financial health and stability. As the global leader of our profession, we can not fail. As a committed dentist with strong financial education and background, I believe that I can leverage my experience to the ADA. The ADA must be an asset to its members and the entire dental ecosystem. Fiscal responsibility and strategic investment are my hallmarks. I will apply my experiences in budgeting, resource allocation, financial planning and reporting are all part of my vision for the financial health of the association.

I am eager to forward the mission of the ADA, supporting its members, advancing the oral health of all Americans, and creating a prosperous future for the entire dental industry.