

Minutes of the  
Fourth Annual Conference

Association of Practice Management Educators (APME)

9 - 10 January 1993

St. Louis Airport Marriott Hotel

### Attendance:

The 1993 APME Conference was attended by the following participants:

James Albright	Ohio State University
Norman Bailey	Houston College
Thomas Bowen	Williams Marketing
Bill Boyts	Allergan Optical
Jack Bridewell	Houston College
John Classé	University of Alabama
Paul Farkas	Southeastern University
Neil Gailmard	Illinois College
James Hawley	Southern California College
Craig Hisaka	University of California at Berkeley
Richard Hopping	Southern California College
Harry Kaplan	Pennsylvania College
Thomas Kimball	Guest Speaker
Donald Lakin	Ferris State University
Gary Moss	New England College
Cindy Osmun	Allergan Optical
David Park	Southern California College
Debbera Peoples	Bennett Center
Stuart Rothman	State University of New York
Ronald Rounds	Northeastern State University
John Rumpakis	Pacific University
Peter Shaw-McMinn	Southern California College
William Stephen	AOSA
Lawrence Thal	University of California at Berkeley
Jim Trunick	Allergan Optical
Mike Usdan	Southern College
Brad Williams	Williams Marketing

### Adoption of Definition:

Dr. Hopping reported that the Association of Schools and Colleges of Optometry (ASCO) adopted the following:

“Practice management is that aspect of the profession of optometry which incorporates as an academic area the study of ethical, legal, administrative and clinical care issues to assure that the optometrist provides the health care consumer with quality, accessible and cost efficient eye health and vision care.”

### Curriculum Committee:

The Curriculum Committee adopted a mission statement, "to develop and implement instructional programs to improve the quality of practice management education at the optometry schools".

The Association approved of the Committee's plans to develop lesson plans and a teacher's manual to accompany the textbook. Thomas Kimball, Ph.D., was invited by the Committee to present his professional thoughts in this regard during our Saturday evening work session.

The Committee also presented a proposed APME "Code of Ethics" and APME "Patient's Bill of Rights". There was lengthy discussion regarding both and whether either could be adopted prior to the Association defining APME membership goals and objectives.

It was moved, seconded, and unanimously passed that, "APME accept the report of the Curriculum Committee on a Code of Ethics and encourage all members to consider content as guidelines for behavior, possible conflict of interest, and give thought to future action. This body will reconsider the need for a Code of Ethics in two years or sooner if the need becomes apparent. All members express heartfelt thanks to Peter Shaw-McMinn for his creation of this document."

### Research Committee:

It was confirmed that the Research Committee would, with assistance from the Bennett Center, serve as a depository for research projects (i.e., optometry theses) relating to optometric practice management and that they would publish and distribute an annually updated index of such projects. Each attendee should request their school libraries forward past projects to the Bennett Center.

The Committee deferred, until completion of the textbook, the request to develop a research proposal and grant request for "economic models of optometric practice".

### Publications Committee:

The Publications Committee met with each chapter author. All chapters will be submitted by mid-March and editing will begin in the summer. A complete draft should be submitted to publishers by our next meeting in January 1994.

### Pathways in Optometry/Pathways in Practice:

The Pathways report was given by Bill Boyts and Jim Trunick. It is contained as an attachment to these minutes. Jim also discussed Allergan's Strategic Goals and Objectives.

## Committee Appointments:

It was decided that a minimum of change would again be appropriate as existing committees had worked together for only two years.

Larry Thal, Executive Board Chair, has appointed or re-appointed the following for 1993:

### Executive Board:

Lawrence Thal, Chair  
Neil Gailmard, Vice-Chair  
Richard Hopping  
Jim Albright  
Peter Shaw-McMinn (Curriculum Committee Chair)  
Debbera Peoples and Jim Marbourg (Research Committee Co-Chairs)  
John Classé (Publications Committee Chair)

### Curriculum Committee:

Peter Shaw-McMinn, Chair  
John Rumpakis, Vice-Chair  
Jack Bridwell  
Paul Farkas  
Harry Kaplan  
Donald H. Lakin  
Stuart Rothman  
Ron Rounds  
Michael Usdan

### Research Committee:

Jim Marbourg, Co-Chair  
Debbera Peoples, Co-Chair  
Howard McAlister  
Gary Moss  
Thomas Sandler

### Publications Committee:

John Classé, Chair  
Craig Hisaka  
Ron Rounds  
Larry Thal

### Next Meeting:

It is hoped that APME will continue to receive the generous sponsorship of Allergan Optical to enable APME to hold its Fifth Annual Conference next year.

### Acknowledgment:

We wish to convey our thanks and appreciation to the Association of Schools and Colleges of Optometry (ASCO) for supporting the 1993 APME Conference. We gratefully acknowledge the financial support of Allergan Optical which has provided the funding necessary to enable this conference to be held.

### Attachments:

Attachment A: Practice Management Definition

Attachment B: Curriculum Committee Report

Attachment C: Report from Dr. Boyts

ASSOCIATION OF PRACTICE MANAGEMENT EDUCATORS (APME)

Fourth Annual Conference  
9-10 January 1993  
St. Louis Airport Marriott Hotel

-AGENDA-

Friday, 8 January - arrival and hotel check-in (check with your committee chair as to whether a committee meeting will be held Friday evening)

Saturday, 9 January -

8:00 a.m. - coffee and sweet rolls

8:30 a.m. - Introduction of participants  
- Administrative announcements  
- Review of APME goals and objectives

9:00 a.m. - APME Committee Reports  
- Executive Board - Larry Thal  
ASCO Restricted Fund Account - Dick Hopping  
- Curriculum Committee - Peter Shaw-McMinn  
- Research Committee - Jim Marbourg/Debbera Peoples  
- Publications Committee - John Classé

10:00 - 10:15 - Break

10:15 - Individual school curriculum updates - Ron Rounds and Mike Usdan

11:00 - Ethics - Discussion and adoption of "Patients' Bill of Rights" and "Clinic Code of Ethics" - Peter Shaw-McMinn

12:15 - 1:30 - Lunch

1:30 - 3:00 - Allergan Strategic Goals and Objectives - Jim Trunick  
- "Pathways in Optometry" update - Bill Boyts  
- "Pathways in Practice", Interactive Practice Management seminars - Jim Trunick, Bill Boyts, Brad Williams and Neil Gailmard

3:00 - 4:30 - Practice Management Textbook - John Classé  
- APME Graduate Questionnaire Results - John Classé

5:00 - 6:00 - Break and reception

6:00 - 9:00 - Dinner meeting  
- Guest presentation - Peter Shaw-McMinn will introduce Thomas Kimball, Ph. D., to discuss objectives to be considered for textbook companion materials  
- Open discussion

Sunday, 10 January -

8:00 a.m. - coffee and sweet rolls

8:30 a.m. - Practice management research index - Debbera Peoples  
- The California Optometric Survey - Thal/Hisaka  
- An Economic Model of Optometric Practice - funding a new research project - Classé

10:00 - 10:15 - Break

10:15 - 10:45 - Student perceptions of their practice management curricula (a research report) - Hisaka/Thal

10:45 - 12:15 - Textbook work session - Classé

12:15 - 1:30 - Working lunch by committee (hotel check-out)

1:30 - Presentation of committee recommendations and final report  
a) Action on prior recommendations  
b) New recommendations  
d) Committee charges

3:00 - Discuss date and place of next APME meeting  
- Other administrative announcements

3:30 - departure (Please try not to schedule departing flights until at least 4:15 p.m.)

ATTACHMENT A





## Southern California College of Optometry

2575 Yorba Linda Boulevard • Fullerton • California 92631-1699 • (714) 449-7450

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Richard L. Hopping, O.D.  
President

### MEMORANDUM

TO: Association of Practice Management Educators

FROM: R. L. Hopping, O.D.

DATE: July 10, 1992

SUBJ: PRACTICE MANAGEMENT DEFINITION

DIST: Dr. William Boyts, Dr. Robert Maynard, Dr. James Hartzell, Dr. Jack Runniger, Reynold Malmer, Martin Wall

At their annual meeting in Montreal, I am pleased to report that the Association of Schools and Colleges of Optometry adopted the following definition:

"Practice management is that aspect of the profession of optometry which incorporates as an academic area the study of ethical, legal, administrative and clinical care issues to assure that the optometrist provides the health care consumer with quality, accessible and cost-efficient eye health and vision care."

This adopted version was a slight modification of the definition adopted by the APME in January 1992. I believe the modifications to be an improvement.

This definition should be distributed to your institutions, continuing education departments and various state boards.

RLH:dc

ATTACHMENT B

## MEMORANDUM

To: Larry Thal, O.D.  
From: Peter G. Shaw-McMinn, O.D.  
Subj: APME Curriculum Committee Meeting  
Dist: Curriculum Committee  
Date: January 20. 1993

Below is the mission statement adopted by the curriculum committee and action items describing the scope of committee activities.

**Mission Statement:** To develop and implement instructional programs to improve the quality of Practice Management education at the optometry schools.

### **Action Items:**

Standardize the PM curriculum at all schools.

Recommend a number of hours offered on 'PM in schools' curriculum.

Review the sequence and timing of curricular elements.

Share lesson plans and resource materials.

Recommend types of guest lectures to complement the PM educator. Ex. Insurance Agent, CPA, lawyer, architect.

Compose a list of exercises and activities that have been successful in the classroom.

Distribute PM materials provided by industry.

Present our teaching methods and best lectures to the APME.

Recommend effective approaches to teaching. For example, the steps of orientation, persuasion, instruction, guided practice, closure.

Provide an 'expert' teaching model as a mentor teacher with videos of presentations.

Act as a 'clearinghouse' for available teaching resources.

Complete a student workbook with activities for independent study by the student.

Provide and distribute slide presentations, transparency masters.

Recommend speakers to the APME to provide better teaching methods.

Measure the effectiveness of lesson plans.

Recommend minimal competencies for our students and criterion referenced instructional grading and evaluation.

Recommend prerequisites to gain admittance into the PM curricular tract.

Share testing instruments to measure validity/reliability in evaluating whether we are effectively teaching.

Monitor trends within the profession which effect the PM curriculum.

Reconsider value of past curricular elements.

Monitor outside fields of academia associated with the PM curriculum. (Trend analysis and customer responsiveness are current buzz words).

Recommend the use of Prodigy as an electronic billboard to communicate within the curriculum committee.

Identify current areas of concern such as third party billing.

Complete a Teachers Manual/Curriculum Guide to accompany the textbook.

The curriculum committee believes these action items define the scope of the committee.

The curriculum committee is currently developing lesson plans and teacher manual materials for each chapter in the text book.

# THE ASSOCIATION OF PRACTICE MANAGEMENT EDUCATORS

## CODE OF ETHICS

A Member shall devote time, thought, and study to his or her duties as a member of the Association of Practice Management Educators.

A Member shall be responsible to learn how the Association of Practice Management Educators functions--its objectives, strengths, uniqueness and needs and its place as an organization providing quality postsecondary education.

A Member shall carefully prepare for, attend all meetings, and actively participate in all Association committees.

A Member shall accept and abide by all the resolutions and policies adopted by the Association of Practice Management Educators.

A Member shall base his or her vote upon the available facts in each situation and shall exercise his or her best judgment in making decisions which affect the policies and directions of the Association of Practice Management Educators.

A Member shall vote according to his or her individual conviction, and may challenge the judgment of others when necessary; yet a Member shall be illing to support the majority decision of the Association and work with fellow members in the spirit of cooperation.

A Member shall maintain the confidential nature of Association deliberations while in closed session. This includes written and verbal communications concerning the closed session. A Member shall avoid acting as a spokesperson for the Association unless specifically authorized to do so.

A Member shall understand the role of the Association as a policy making body and avoid participation in administration of that policy unless specifically authorized to do so by the Association.

A Member shall learn and consistently use designated institutional channels when conducting Association business (e.g. responding to committee activities).

A Member shall refrain from accepting duties, incurring obligations, accepting gifts or favors, engaging in private business or professional activities when there is, or would appear to be, a conflict or incompatibility between the Members private interests and the interests of the Association of Practice Management Educators.

A Member shall refrain from any actions and involvements that may prove embarrassing to the Association of Practice Management Educators.

A Member shall act and make judgments always on the basis of what is in the best interests of the Association of Practice Management Educators and the advancement of higher education in general.

## THE ASSOCIATION OF PRACTICE MANAGEMENT EDUCATORS

### PATIENT'S BILL OF RIGHTS

The Association of Practice Management Educators presents this statement of patient's rights in the knowledge that observance of it will contribute better patient care and, therefore, greater satisfaction for the patient, the doctor and the clinical organization. Furthermore, the Association presents these rights in the expectation that they will be supported by the clinic on behalf of its patients, as an integral part of the health care process. It is recognized that a personal relationship between the doctor and the patient is essential for the provision of proper health care. It is in recognition of these factors that these rights are affirmed. You as a patient:

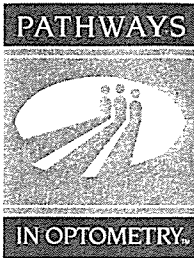
- 1) Have the right to considerate and courteous care. You have a right to receive this institution's finest efforts to provide quality care regardless of age, race, creed, religion, or national origin.
- 2) Have the right to receive complete, current information about your diagnosis, treatment, and progress in terms you can understand. When it is not advisable to give such information to the patient, the information will be available to an appropriate person. You, as a patient, have the right to know the names of all individuals providing your care.
- 3) Have the right to receive information necessary for informed consent prior to referral for additional care or the implementation of a program of therapy. Except in emergencies, such information for consent should include, but not be limited to, the specific procedure and/or treatment, the health risks involved, and the probable duration of treatment. When significant alternatives for care or treatment exist, or, when you, as a patient, request information about alternatives, you have the right to such information. You also have the right to know the name of the individual(s) providing the procedures and/or treatment.
- 4) Have the right to refuse treatment to the extent permitted by law and to be informed of the consequences of your action.
- 5) Have the right to have information about your health care program treated in a confidential manner. Those not directly involved in your care must have your permission to be present.
- 6) Have the right to expect that all communications and records pertaining to your care will be treated as confidential.
- 7) Have the right to expect that the clinic, within the limits of its capability, will provide evaluation, services and/or referral as indicated, upon your request. When necessary you will be referred to another provider of health care services and complete information and explanation concerning the

need will be provided to you, and upon your consent, to the provider to whom you are being referred.

- 8) Have the right to obtain information as to any relationship of the clinic to other health care and educational institutions insofar as your care is concerned. You have the right to obtain information as to the existence of any professional relationships among individuals, by name, who are treating you.
- 9) Have the right to be advised if the clinic proposes to engage in or perform human experimentation affecting your care or treatment. The patient has the right to refuse to participate in such research projects and to receive more traditional care, or to be referred for such, if it is available.
- 10) Have the right to expect reasonable continuity of care. You have the right to know in advance what appointment times and services are available and where. You, as a patient, have the right to expect that the clinic will provide a mechanism whereby you are informed by your doctor, or a delegate of the doctor, of your continuing health care requirements following treatment.
- 11) Have the right to seek other opinions regarding your condition, prognosis, and course of therapy either from within the clinic or from an outside practitioner. You have the right to expect full cooperation from the clinic to provide to the outside practitioner of your choice any and all information in your patient file, after you have given a signed release form to the clinic.
- 12) Have the right to be informed of all professional fees prior to the provision of such services. You have the right to examine and receive an explanation of your bill regardless of source of payment.
- 13) Have the right to know what institutional rules and regulations apply to your conduct as a patient.
- 14) Have the right to know what review procedures exist and you have the right to be advised how these procedures may be initiated.



ATTACHMENT C



## MEMORANDUM

**TO:** Dr. Larry Thal  
**FROM:** Bill Boyts, O.D.  
**CC:** Dr. Richard Hopping, Jim Trunick  
**DATE:** November 4, 1992  
**SUBJECT:** APME Meeting

As you may or may not know, ASCO passed a resolution in Montreal to sponsor and endorse a two-day interactive Practice Management seminar that was discussed at last year's APME meeting. Allergan has agreed to fund the developmental costs and three pilot programs. The target audience will be the recent graduates for the past five years, although any practitioner may attend. There will be a sliding registration fee based on time in practice.

ASCO has appointed an advisory panel of Drs. John Classe, Mike Usdan, Neil Gailmard, and John Rumpakis. A meeting has been scheduled for November 10 along with members of the AOA Practice Management committee. This committee is chaired by Dr. Peter Shaw-McMinn, who will be attending with another member, Dr. Ron Hopping.

The purpose of the meeting is to determine dates, location, subject material, agenda, LE credit, promotion and handout material, registration fees etc. The purpose of the pilot programs, to be completed by June 30, 1993, is two-fold:

1. Fees generated by the pilot programs will go into a fund to take the programs nationally. With the initial funding and registration fees from subsequent meetings, the national program should be self-funding.
2. By evaluating the three pilot programs and make changes after each to be incorporated into the following pilot, we hope to come up with a final version which will then be taken nationally.

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Since this will be of interest to the APME, I would like 30 - 45 minutes on the APME agenda, along with Jim Trunick, V.P. of Optometric Marketing for Allergan, Inc., Dr. Brad Williams of Williams Marketing and Management, Dr. Peter Shaw-McMinn and the advisory panel, to discuss this program.

In addition, Jim Trunick would like 15 - 20 minutes to bring the APME members up to date on Allergan's position on their role with Optometry as it applies to strategic goals and objectives. If possible, Jim should make his presentation sometime prior to the discussion on the new program, tentatively called Pathways in Practice.

However, the real purpose of this memo is to remind you to get out a tentative agenda for the APME meeting!

Please let me know if the above can be included in your agenda.

Thank you.

BB

stg

## PATHWAYS IN PRACTICE

Overview/Recommendation From Meeting November 10, 1992

### I. Who's Attending

- A. Target doctors out 0-5 years
- B. Secondary target of any O.D. wanting to attend
- C. Optometric VIPs as honorary attendees

### II. Content

#### A. Day One

- 7:15 - 7:30 registration
- 7:30 - 8:00 continental breakfast
- 8:00 - 12:00:
  - 1. Intro
  - 2. Organizational and staff management
    - a. Mission building
    - b. Time management
    - c. Matrix management
    - d. Management by objectives and statistics
    - e. Business and team meetings
- 12:00 - 1:15 lunch
- 1:15 - 5:00:
  - 1. Business management
    - a. Budgets
    - b. Financial goals and objectives
    - c. Chair cost analysis
    - d. Fee structure
    - e. Reserve account
    - f. Patient billing and accounting
    - g. Inventory management
- 5:00: Hospitality function

#### B. Day Two

- 7:30 - 8:00 continental breakfast
- 8:00 - 10:00 internal marketing
  - 1. Patient communication
  - 2. Preappointment
  - 3. Recall
  - 4. Marketing niches and USP (unique selling proposition)
  - 5. Referral enhancement
- 10:00 - 10:15 break
- 10:15 - 11:45 external marketing planning and programming
- 11:45 - 1:00 lunch
- 1:00 - 2:30 effective third party management
- 2:30 - 2:45 break
- 2:45 - 4:45 separate into groups of "buy in/buy out" and start cold
  - 1. Buy in/Buy out
    - a. Practice evaluation
    - b. Contract/legal
    - c. Business plan
    - d. Financing
    - e. Ramifications of partnership/group
  - 2. Starting own practice
    - a. Site analysis
    - b. Business plan
    - c. Office space/design
    - d. Beginning equipment and inventory
- 4:45 Close

ALLERGAN/ASCO/AOA COMMITTEE ON PRACTICE MANAGEMENT  
ADVISORY BOARD MEETING  
DALLAS, TX  
NOVEMBER 10, 1992

Meeting objective: To reach consensus on the agenda/material/format for a two-day ASCO/Allergan sponsored, post-graduate Practice-Management seminar, specifically designed for, but not limited to, recent Optometric graduates. (1 - 5 years out of school).

Seminar strategy: To prepare Optometrists to succeed in managing patient and business challenges as a primary provider.

Summary:

Concept

The overall concept of the seminar including the subject material, agenda and format, was accepted by the board with the addition of Time Management and the rescheduling of time periods and subject order in the second day. A new agenda will be forthcoming to reflect the additions/changes.

Name

In order to capitalize on the huge success of the Pathways in Optometry and the high recognition of the name by recent graduates, it was decided, after some discussion, that the seminars will be called Pathways in Practice.

Target audience

The primary target audience will be the recent Optometric graduates who have been out of school from 1 - 5 years. The Pathways surveys indicate that for the first two years out of school, approximately 80% of the graduates see themselves working as an employee. However, by the fifth year out of school, the trend reverses: approximately 80% see themselves in some type of an employer role such as sole practitioner, a partnership or part of a group practice. Therefore, because of these role changes, this group becomes the primary target audience.

The secondary target audience will be all other interested Optometrists. Much of the material, even though designed for the recent graduate, will have application for the established practitioner.

#### Promotional program

The promotional program to recent graduates will be a direct-mail letter/registration sent by ASCO to the graduates. Three mailings are anticipated.

In addition, ads will be placed in AOA News and various Optometric Journals, supplemented by articles and press releases on the pilot programs.

Allergan's field sales force will play an important role by individually promoting the seminars to the practitioners in the pilot program areas.

#### Registration fess

A five tier pre-registration/registration fee scheduled will be used at the seminars.

<u>Years out of School</u>	<u>Pre-registration</u>	<u>On-Site Registration</u>
0-2	\$100	\$150
2-3	150	200
3-4	200	250
4-5	250	300
5 +	300	350

Technicians/Assistants accompanying doctor \$75

Registration will include continental breakfast, all coffee breaks and lunch both days with an Allergan reception/dinner the first night.

#### Location/Dates

After some discussion, it was decided that the pilot programs will be held in Memphis, Houston and Los Angeles during April/May/June of '93

#### Logo

A new logo was selected from four recommendations. The logo accepted most closely follows, in concept, the current Pathways in Optometry logo.

Continuing educational credit

ASCO will assist in seeking continuing educational credit in the primary states in or around where the pilots will be held.

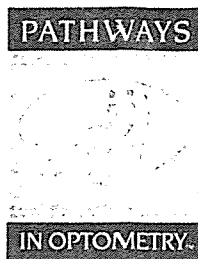
Survey/Evaluation/Critique

Survey and evaluation forms similar to those in the current Pathways program will be used in the pilot programs.

In addition, board members will be expected to attend to evaluate/critique the program. Immediately following the presentation, a complete review, evaluation and critique will be done by the advisory board members, Williams Marketing and Allergan. This format will be used at all three pilots.

Overall evaluation

Based on comments during and following the meeting, it was the general consensus that it was a good meeting. It was productive, with little time wasted and the closure was completed in the key areas of discussion.

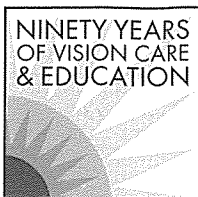


## PATHWAYS IN OPTOMETRY

1992-1993

AUGUST	2	Penn. College of Optometry	Mark Adams Hotel
SEPTEMBER	12	Univ. of Calif., Berkeley	Claremont Hotel
	13	Pacific University	Portland Marriott
	20	Univ. of Houston	J.W. Marriott
OCTOBER	16	Inter-American Univ.	San Juan Hilton
	31	NEWENCO	Cambridge Marriott
NOVEMBER	15	State Univ. of N.Y.	Macklowe Hotel
DECEMBER		None	
JANUARY	17	Southeastern University	Ft. Lauderdale Marriott
	30	The Ohio State University	Columbus Marriott
	31	Indiana University	Indiana Memorial Univ.
FEBRUARY	6	Southern College of Optometry	Memphis Marriott
	7	Univ. of Alabama, Birmingham	Pickwick Center
	19	Northeastern University	University Center
	20	Univ. of Missouri, St. Louis	Airport Marriott
	28	SCCO, Fullerton, Calif.	Double Tree Hotel
MARCH	14	Ill. College of Optometry	Chicago Marriott
	20	Ferris State University	Clarion Hotel





SOUTHERN CALIFORNIA COLLEGE OF OPTOMETRY

2575 Yorba Linda Boulevard  
Fullerton, California 92631-1699  
714/870-7226, Fax 714/879-9834

DATE: November 15, 1993  
TO: APME Curriculum Committee  
FROM: Peter Shaw-McMinn  
**SUBJ: COMMITTEE MEMBER ASSIGNMENTS**

Greetings colleague! I hope this memo finds you all doing well. During our last meeting we discussed what actions would be within the scope of our committee. At this time I'd like to survey your interest in contributing to any of the following areas. Place a ✓ next to your area of interest. After receiving the surveys, I'll call you with how we shall proceed. Any questions, give me a call at my office (909) 780-0270 or home (909) 780-7438. I'm looking forward to hearing from you.

PSM:ph

## Action Items:

*(Place a ✓ next to your area of interest.)*

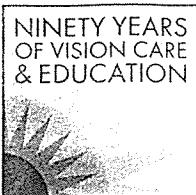
- ☐ Standardize the PM curriculum at all schools.
- ☐ Recommend a number of hours offered on PM in schools' curriculum.
- ☐ Review the sequence and timing of curriculum elements.
- ☐ Share lesson plans and resource materials.
- ☐ Recommend types of guest lectures to complement the PM educator.  
Ex: insurance agent, CPA, lawyer, architect
- ☐ Compose a list of exercises and activities that have been successful in the classroom.
- ☐ Distribute PM materials provided by industry.
- ☐ Present our teaching methods and best lectures to the APME.
- ☐ Recommend effective approaches to teaching. For example, the steps of orientation, persuasion, instruction, guided practice, closure.
- ☐ Provide an 'expert' teaching model as a mentor teacher with videos of presentations.
- ☐ Act as a 'clearinghouse' for available teaching resources.
- ☐ Complete a student workbook with activities for independent study by the student.
- ☐ Provide and distribute slide presentations, transparency masters.
- ☐ Recommend speakers to the APME to provide better teaching methods.
- ☐ Measure the effectiveness of lesson plans.
- ☐ Recommend minimal competencies for our students and criterion referenced instructional grading and evaluation.

## CURRICULUM COMMITTEE SURVEY

Name \_\_\_\_\_

- ☐ Recommend prerequisites to gain admittance into the PM curricular tract.
- ☐ Share testing instruments to measure validity/reliability in evaluating whether we are effectively teaching.
- ☐ Monitor trends within the profession which affect the PM curriculum.
- ☐ Reconsider value of past curricular elements.
- ☐ Monitor outside fields of academia associated with the PM curriculum. (Trend analysis and customer responsiveness are current buzz words.)
- ☐ Recommend the use of Prodigy as an electronic billboard to communicate within the curriculum committee.
- ☐ Identify current areas of concern such as third party billing.
- ☐ Complete a Teachers Manual/Curriculum Guide to accompany the textbook.

*Mail to:* Peter Shaw-McMinn, O.D.  
16327 Sally Lane  
Riverside, CA 92504



SOUTHERN CALIFORNIA COLLEGE OF OPTOMETRY

2575 Yorba Linda Boulevard  
Fullerton, California 92631-1699  
714/870-7226, Fax 714/879-9834

DATE: November 15, 1993  
TO: APME Curriculum Committee  
FROM: Peter Shaw-McMinn  
**SUBJ: COMMITTEE MEMBER ASSIGNMENTS**

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PSM:ph

## Action Items:

(Place a ✓ next to your area of interest.)

- ☐ Standardize the PM curriculum at all schools.
- ☐ Recommend a number of hours offered on PM in schools' curriculum.
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Ex: insurance agent, CPA, lawyer, architect
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- ☐ Act as a 'clearinghouse' for available teaching resources.
- ☐ Complete a student workbook with activities for independent study by the student.
- ☐ Provide and distribute slide presentations, transparency masters.
- ☐ Recommend speakers to the APME to provide better teaching methods.
- ☐ Measure the effectiveness of lesson plans.
- ☐ Recommend minimal competencies for our students and criterion referenced instructional grading and evaluation.

## CURRICULUM COMMITTEE SURVEY

Name \_\_\_\_\_

- ☐ Recommend prerequisites to gain admittance into the PM curricular tract.
- ☐ Share testing instruments to measure validity/reliability in evaluating whether we are effectively teaching.
- ☐ Monitor trends within the profession which affect the PM curriculum.
- ☐ Reconsider value of past curricular elements.
- ☐ Monitor outside fields of academia associated with the PM curriculum. (Trend analysis and customer responsiveness are current buzz words.)
- ☐ Recommend the use of Prodigy as an electronic billboard to communicate within the curriculum committee.
- ☐ Identify current areas of concern such as third party billing.
- ☐ Complete a Teachers Manual/Curriculum Guide to accompany the textbook.

*Mail to:* Peter Shaw-McMinn, O.D.  
16327 Sally Lane  
Riverside, CA 92504

# Memorandum

**To:** APME Curriculum Committee  
**From:** Peter Shaw-McMinn, O.D.  
**Date:** December 15, 1993  
**Subject:** January 1994 meeting

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For those arriving Friday night, I'd like to hold a Curriculum Committee meeting in my hotel room at 8:00. At that time we will discuss:

- Curriculum Guide Format
- Recommendations for the standardization of the Practice Management curriculum at all schools.
- Recommendations as to the minimum number of hours offered on Practice Management in schools' curriculum
- Recommendations on types of guest lecturers to complement the PM educator
- Trends within the profession which affect the PM curriculum
- Use of prodigy to communicate within the curriculum committee.

There will be four half-hour presentations sharing effective teaching methods during the Saturday night dinner. If anyone else would like to present information please contact me or Gary Moss.

Keeping with our one year tradition, pizza and drinks will be available.

If you have any questions, or additional items for discussion, please give me a call. My office number is (909) 780-0270, home is (909) 780-7438.

See you in January!





July 13, 1993

Dr. Peter Shaw McMinn  
27830 Bradley Road  
Sun City, CA 92381

Dear Dr. McMinn:

As new optometric practice management programs are developed, it is important to maintain a historical perspective of where the concept of practice management originated, and how it progressed through the team work of academia, the profession and industry.

A position paper on Allergan's Pathways in Optometry® management program is attached for your review, to give you a better understanding of the industry's contributions. Although this document is not authorized for duplication or publication, it is provided for your use as background information.

Pathways in Optometry is a career management program for third-year students. It is the only program to be fully endorsed by the American Optometric Association, the Association of Schools and Colleges of Optometry, and the American Optometric Student Association. The program is sponsored and managed by Allergan, and the unification of academia, practitioners and industry on this project makes it a landmark case study.

As many organizations and individuals attempt to duplicate Pathways in Optometry, it is important to know that this was the first program in this arena and remains the benchmark by which others measure quality.

Now in its fifth year of service to optometry students, Pathways in Optometry has trained 4,000 of today's practicing optometrists through 63 workshop sessions at each school of optometry in North America. It is currently mandatory curriculum at 13 schools and colleges of optometry.

As leadership changes and evolves within optometry and the industry, it is our hope that the enclosed position paper will serve to maintain the integrity and intent of Pathways in Optometry for years to come. We would appreciate any comment you might have on the paper, and look forward to your input.

In addition, as issues regarding practice management develop in the future, please feel free to contact me for additional background information on the subject.

Best regards,

Jim Trunick  
Vice President, Professional Development



## Pathways in Optometry®

### A Historical Overview of an Allergan Program for Optometry

#### January, 1989

The Pathways in Optometry® Program (Pathways) was conceived by Allergan, Inc. in early 1989 as a follow-up to a similar support program for ophthalmology residents called Future Focus. This support program, presented by a consulting firm made up of ophthalmologists and lay personnel, was a practice management program for ophthalmology residents that centered on the business/management of an ophthalmology practice.

#### April, 1989

Initially Allergan's intent was to duplicate the Future Focus program for optometry, utilizing the planning committee that developed the original program. However, Allergan became aware of an extensive practice management program that the American Optometric Association (AOA) had recently developed for practicing optometrists. The program, called Practice Enhancement Program (PEP), was a multi-year, multimillion dollar program that was implemented nationally by and through the AOA. Dr. Richard Hopping, President of Southern California College of Optometry, founding chair of the AOA Practice Enhancement Program, was requested by Allergan to meet with them and review the PEP Program. After an in-depth discussion of both the PEP Program and the current state of practice management provided in the schools and colleges of optometry, Allergan came to the following conclusions:

- The basic elements of AOA's PEP Program contained the essential elements for the core of a new program for optometry students.
- Because of Dr. Hopping's key role in the initial development and implementation of the PEP Program, coupled with his involvement and understanding of the workings of optometry schools, it was felt that the fundamental success of this new program would be greatly enhanced if Dr. Hopping would serve as Program Coordinator/Consultant and act as the liaison to the AOA's PEP Committee.
- Further, it was recommended that the course format and material content be developed by the AOA's PEP Committee, under the direction of Dr. Hopping.
- Allergan would serve as underwriter for the program, utilizing its corporate strength, services and personnel to complete and implement the program.

#### May, 1989

##### **ASCO/AOSA Educational Grant**

Dr. Hopping agreed to serve as an unpaid consultant to Allergan to carry out the intent and details of the new program. Dr. Hopping recommended to Allergan that, in addition to the AOA PEP Committee, there should be a working relationship with the Association of Schools and Colleges of Optometry (ASCO), a national organization made up of the deans and presidents of the optometry schools in the United States; and the American Optometric Student Association (AOSA), a national organization made up of the students attending the optometric schools. In order to facilitate this working relationship, Dr. Hopping recommended Allergan initially propose an educational grant to ASCO and the AOSA. Allergan agreed and proposed the grant. The terms of the grant were:

- In cooperation with the AOA, Allergan offered to support the design and execution of a supportive program for the schools and colleges of optometry in the subject of practice management for third- and fourth-year students that would, among other things, serve as an extensive personal resource manual for each student, combined with a one-day interactive seminar, together to be called Pathways in Optometry®.
- Dr. Richard Hopping was designated to act as chief coordinator/consultant in carrying out the intent and details of the Pathways Program and the educational grant. In this capacity, he would also seek the full support of the AOA from concept through design and implementation.
- It was the intent of Allergan and Dr. Hopping that the representatives from ASCO and AOSA would also participate in the basic design and execution of the initial pilot Pathways Programs to be held at each of the three college locations before 12/31/89.
- Further, the selection of the ASCO and AOSA representatives and the locations for the three pilot programs were to be made by Dr. Hopping and were to be scheduled for Sunday presentations. Three practice management faculty members from ASCO and three student representatives from AOSA, all from the three selected locations, were invited to participate in the initial design and execution of the Pathways Program and to serve on the initial Pathways Advisory Board. The six representatives chosen had the following responsibilities:
  - Review the proposed materials (subject and content) recommended by the AOA PEP Committee and provide input according to a scheduled time line.
  - Participate in the review and selection of appropriate experts for the didactic, interactive portion of the Pathways Program.
  - Participate in the development and review of the Pathways didactic curriculum.
  - Offer a critique each of the three pilot programs that would enable the final program to be finalized for the additional Pathways Programs that would be presented at each of the remaining optometric institutions.

Based on recommendations of Dr. Hopping, Allergan agreed to schedule a meeting at each of the three regional pilot locations on the Saturday preceding the initial three Sunday Pathways presentations. The purpose of the Saturday meetings was to meet with the practice management instructors to share practice management course outlines, review and update the current ASCO curriculum model in practice management, and, in addition, to encourage the use of the AOA PEP material and the Pathways materials in their practice management curriculum.

Consequently, invitations were extended to two faculty members and one AOSA member from each of the remaining schools of optometry to attend one of the initial three pilot Pathways Programs, participate in the practice management discussion on Saturday and attend the Pathways meeting the following day. The faculty members were the primary practice management instructor and a faculty member who had some responsibility for curriculum development within his institution. Following the pilot programs, these faculty and student representatives were expected to participate in the promotion and staging of the Pathways seminar to be held at their own school in the first half of 1990.

The educational grant provided by Allergan covered honorariums and travel/lodging/food expenses for the Pathways Advisory Board members, honorariums for the ASCO and AOSA organizations, and all travel/lodging/food expenses for each of the faculty members and AOSA representatives who would participate in the two-day meetings at one of the three pilot locations.

June, 1989

Dr. Hopping selected the initial three locations for the pilot programs. They were:

University of Houston, Houston, TX  
Pennsylvania College of Optometry, Philadelphia, PA  
University of Missouri, St. Louis, MO

A memorandum was sent to the deans/presidents of the above schools inviting the lead practice management faculty member and the AOSA school trustee to serve on the Pathways advisory board. All accepted and agreed to serve on the board.

#### **AOA 92nd ANNUAL CONGRESS**

The first official announcement of the Pathways Program was made by Dr. Hopping to the members of the AOA House of Delegates, the profession of optometry's highest governing body.

Dr. Hopping pointed out that Allergan had approached the AOA and indicated Allergan's interest in jointly developing and financially supporting a program that would provide basic business/practice management information for students of optometry. It was further agreed that it would be to everyone's advantage to involve representatives from ASCO and AOSA in the basic design of the program, both the structure and content. Toward that end, Allergan had offered an educational grant to ASCO and AOSA to bring three representatives from each group to work with the AOA and Allergan on the development of the three pilot programs to be given the last half of '89. He concluded his presentation with a brief overview of the conceptual details of the program.

Dr. Hopping then introduced Bill Shepherd, President of Allergan, to the AOA House of Delegates. Mr. Shepherd explained Allergan's role and dedication in supporting the eye care professionals and stated he was proud to announce Allergan's support role for the new Pathways Program for optometry.

Thus, the Pathways in Optometry® Program was officially announced and a real "first" had been created. For the first time, AOA, ASCO, AOSA had cooperatively formed a joint venture with a leader in the ophthalmic industry.

July, 1989

#### **AOA AGREEMENT**

Allergan and AOA developed a letter of agreement which contained the following highlights:

- In cooperation with the AOA, Allergan would agree to support the design and execution of a two-phased supportive program for the students in the schools and colleges of optometry on practice management.
- Phase A would involve the design and execution of a series of one-day seminars for third-and fourth-year optometry students, combined with the issuance to each attendee of a complete set of sixteen of the AOA's current PEP monograms, together to be called Pathways in Optometry®. The Pathways Program would carry the support of the AOA/ASCO/AOSA from concept through design and execution. The logo of all three organizations were to be used on all printed material with appropriate recognition and reference to the AOA and the PEP material.

- Further, Phase A would involve a pilot program to be held at three optometry schools. After refinement of the initial three pilot programs, the program would then be offered to the remaining schools and colleges of optometry.
- Phase B would involve updating and the rewriting of the PEP material from the students' viewpoint. These would be jointly developed by the AOA, Dr. Hopping and Allergan. Phase B was scheduled to be completed by June 30, 1990, and would be provided as a reference manual for the Pathways Program in the '90/'91 scholastic year and succeeding years.

Although the original agreement officially terminated in one year, Allergan indicated that the Pathways Program was to be a long term commitment.

Allergan agreed to provide complete financial support for the Pathways Program, including the initial development and execution of the three, two-day pilot programs; subsequent programs at each of the remaining schools during the first half of 1990; the purchase of the current AOA PEP materials, the revising, rewriting, and printing of the new reference material; acquiring consultants for presenters, including fee and expenses; and all other expenses involved with the program. The budget for the above was set at \$750,000.

A unique aspect of the agreement was the rights to the program materials, and the name. Pathways in Optometry® was to be the trademark of Allergan. All PEP materials purchased from the AOA would remain the exclusive property of the AOA. All other program materials supplied by Allergan remained the property of Allergan.

Preparation of the revised and updated PEP material, to be called The Pathways in Optometry Manual, would be the property of Allergan as long as Allergan agreed to continue to fund the program. If Allergan ceased to fund the program, Allergan agreed to transfer all rights, title and interest in the reference materials used in Phase A and B back to the AOA for an amount not to exceed the actual out-of-pocket direct costs of development.

#### **PATHWAYS ADVISORY PANEL MEETING**

Dr. Hopping, three representatives from ASCO, three representatives from AOSA, and the Allergan planning committee met to develop a one-day agenda for the three pilot programs; specifically, material content, agenda, and speakers. As a result of this meeting the following was recommended:

The one-day seminar topics would be: "Life Style Transition", "Defining and Establishing Goals", "Selecting the Right Pathway", "Managing Practice Finances", "Professional Decision Making Tools" and "Building your Support Network". The format would be didactic seminars with small group (8 person), interactive exercises. This format necessitated the use of table rounds, which would automatically divide the attendees into small groups. The speakers should be the same speakers traveling to each meeting to insure uniformity of presentation. Because of the number of seminars (16) and the length of the seminars, it was recommended that at least two speakers be used, preferably optometric consultants rather than practicing optometrists or optometric school faculty members. Other areas of discussion were: logo, packaging promotion, and dates/locations for the three pilot programs.

August, 1989

## EXECUTIVE DEVELOPMENT CORPORATION

A search was initiated for a key person to act as facilitator for the three pilot programs. Both Dr. Hopping and Dr. Bill Boyts, a member of the Allergan Planning Committee, had had experience with a William Sullivan, President of Executive Development Center of Boston, a managing/educational organization. Drs. Hopping and Boyts had known Bill Sullivan for some 18 years. In the early '70's, Mr. Sullivan had served as a consultant to major ophthalmic manufacturers in the area of practice management. He had done extensive research visiting the nation's more successful optometrists in an effort to ascertain why they were uniquely different from the average or moderately successful optometrists. He also had done consulting for optometrists and ophthalmologists, and in recent years had been doing almost all of his consulting with ophthalmology. Both Drs. Boyts and Hopping attested to Sullivan's experience, talent and knowledge concerning patient management and practice administration. In addition, his organization could provide multiple speakers.

Consequently, Bill Sullivan was contacted, was interviewed by several representatives of the Allergan Planning Committee and Dr. Hopping, and was hired to develop a tailor-made program. The seminar proposal by Sullivan was highly interactive, centered around the ASCO/AOSA recommendations and with Sullivan's knowledge base in practice management and his understanding of educational methodology, it was felt that his proposal would meet all the Pathways objectives. Consequently, his proposal was accepted and Sullivan and his staff initiated the development of the Pathways Program.

## SEMINAR DATES

With the acquisition of a program development/presenter group, seminar dates were set:

University of Houston	October 14-15, 1989
Pennsylvania College of Optometry	November 4-5, 1989
University of Missouri, St. Louis	November 18-19, 1989

Activities increased dramatically. Hotel arrangements were made to accommodate the ASCO/AOSA practice management meetings on Saturdays and the Pathways in Optometry meetings on Sunday. Continental breakfast, coffee breaks, buffet lunch, and A/V equipment were ordered. All attendees were contacted and confirmed to attend one of the three pilots, along with confirming their respective travel and room arrangements.

It was decided that the target audience, third-year, fourth-year and recent graduates, would receive three mailings: A promotional announcement one month prior to the meeting, an invitation and a BRC two weeks before the meeting, and a reminder card one week prior to the meeting. Promotional posters were to be sent to the schools for their bulletin boards.

Sullivan and his staff were working on the seminar hand-out materials. The PEP materials were ordered from the AOA. The AOA/Allergan agreement was being reviewed/revised by both parties. Press releases were being made to the major optometric publications. Everything was on schedule and moving forward.

### September, 1989

Dr. Bill Boyts, a member of the Allergan Planning Committee was appointed Manager for the Pathways Program, with primary responsibility for attending, coordinating and managing all on-site activities. Dr. Boyts, in mid 1988, had submitted the original marketing plan for the program and had been a key member of the Allergan Planning Committee.

Posters were shipped, announcements and invitations were made, confirmations secured and final hotel arrangements were made for the first Pathways in Optometry® Program to be held on October 14-15 at the J.W. Marriott in Houston, Texas.

### October, 1989

Meeting dates and locations were initiated for the remaining schools. These meetings will take place February through May, 1990.

#### **FIRST PILOT PROGRAM:        UNIVERSITY OF HOUSTON, HOUSTON, TEXAS    SATURDAY, ASCO/AOSA MEETING**

The Saturday meeting had approximately one-third of the Optometry schools represented, with two faculty members and the AOSA trustee from each representative school. One purpose of this meeting was the exchange of curriculum outlines for the Practice Management course at each of the schools. Dr. Hopping, who chaired the meeting had requested the curriculum outlines from all the schools prior to the meeting and made them available to all attendees. Each school then briefly covered what was being done in their school with a question and answer period following. Everyone felt that the sharing of outlines and the discussions were very beneficial. This was the first opportunity for such an exchange since an April 1986 Practice Management Instructors Conference sponsored by AOA/ASCO. It was recommended at that such meetings should be held on an annual basis and that the Pathways Program may act as a stimulus for such a program. In fact, that is what happened: Allergan sponsored the first Practice Management Educator's Conference in January, 1991, 1992 and subsequent conferences in January 1993.

#### **SUNDAY, THE PATHWAYS IN OPTOMETRY® PROGRAM**

Invitations had been sent to the third year, the fourth year and the recent graduating class. It should be pointed out that, as a rule, only one-third of the fourth year class was on campus at any given time because of the Extern Program prevalent in most schools. The remainder of the student's time is spent in various types of clinical practice throughout the country. Also, the recent graduates were scattered across the country and may not be able to attend. This left the third-year students as the primary target audience.

Mr. Sullivan and one of his associates presented the initial program. 79 students and 6 student guests attended the meeting. The post-seminar student evaluation showed that the 79 students rated the overall evaluation of the meeting at 3.54 out of 5.0 while the 14 faculty rated it at 3.43. When asked if they would recommend the program to others, the students reported 67 yes, 8 no and 3 yes with modifications, and 1 unsure. All faculty recommended the meeting. Excellent constructive comments were made by students and faculty.

The Allergan Planning Committee and Dr. Hopping then spent several hours following the close of the meeting critiquing the meeting. The Allergan staff and Dr. Hopping were much more critical and were not pleased with the initial presentation. Significant changes in content, organization and delivery were mandated to be made prior to the next meeting, which was to be held in Philadelphia on November 4th and 5th. Lengthy meetings and conversations were held in preparation for that meeting.

November, 1989

### **THE SECOND PATHWAYS IN OPTOMETRY® PILOT PROGRAM SATURDAY, ASCO/AOSA**

This meeting was again attended by approximately another one-third of the schools, represented by faculty and AOSA student trustees, was essentially a duplicate of the first meeting with the same enthusiastic response.

### **SUNDAY, THE SECOND PATHWAYS IN OPTOMETRY® PILOT PROGRAM**

The second Pathways meeting got off to a bad start primarily due to the hotel sound system. 152 students attended the second meeting and ranked the meeting 3.60 out of 5.0. When asked if they would recommend the meeting to other students, 90% reported yes, 5% no, and 5% yes with modifications. 13 faculty reported yes, and 1 faculty reported no.

At the conclusion of the second meeting, a review and critique of the meeting was again held with the AOSA Trustees, the attending faculty members, Dr. Hopping and the Allergan staff, with many suggestions made to improve the program. The Allergan staff and Dr. Hopping were definitely not pleased with the second presentation, as many of the changes requested had not been made and the second presentation was little, if any, improvement over the first. Dr. Hopping and the Allergan staff then met with the program principals in a post-mortem of the day in an attempt to learn what they felt was the outcome and any changes they recommended. Their response indicated that they did not at all perceive the reality of the problems with the second presentation, nor did they comprehend the changes requested that had been related to them following the Houston meeting. After excusing the speakers, the Allergan staff and Dr. Hopping made a difficult, necessary, unanimous decision to terminate the services of the speakers. This decision was reached by the Allergan leadership in spite of the fact that they had an existing contract with Mr. Sullivan to provide the initial three pilot programs. In the interest of quality and the Pathways Program, Allergan chose to pay him off and terminate the relationship.

The difficult part of the decision was that invitations had been sent and all arrangements had been made for the third pilot meeting to be held in St. Louis just two weeks later on November 18 and 19. Also, most dates and hotel arrangements had been made for meetings in February through May, 1990. After much discussion, the final decision was made to proceed with the St. Louis meeting with the ASCO/AOSA leaders on Saturday, but to notify and postpone the St. Louis Pathways Program until sometime after the first of the year. It was further agreed that the scheduled Pathways Program would instead be used to audition new presenters. Dr. Hopping and Dr. Boyts were assigned the responsibility of finding new candidates for the audition.

### **Saturday, ASCO/AOSA**

The third and final ASCO faculty and AOSA leaders met and followed the agenda that had been used at the prior two meetings. These meetings served as the nucleus of what has now developed into the annual Practice Management Educator Conference sponsored by Allergan.

### **Sunday, Audition for Pathways Presenters**

Dr. Hopping and Dr. Boyts had been successful in locating three other organizations to audition as presenters. The faculty members and the AOSA members who participated in the Saturday meeting joined the Advisory Board and the Allergan staff to form the audition team of evaluators for the Sunday meeting. The new groups had been briefed and provided background materials. Each presenting group was requested to design a full one-

day agenda for the Pathways in Optometry®, and to give an audition presentation of up to 1 1/2 hours in duration on one segment of their proposed agenda. Following the three presentations, the 20 people in attendance were asked to rank order the three presenters and to indicate if they would hire all, any or none of the groups. The results were very clear that one organization should not be hired under any circumstances, and that there was an unanimous choice of the winner. Williams Marketing and Management Company of Lincoln, Nebraska, was chosen to be the new presenters of the Pathways Program. The Williams Organization, founded by Dr. Brad Williams, did strictly optometric consulting on a nationwide basis. All of the evaluators had a good feeling about this group.

#### December, 1989

Firm dates and hotel locations were confirmed for the remaining 14 schools which were scheduled from February 3, to May 18, 1990.

Because of the shortness of time, Williams Marketing worked at a fever-pitch to complete the handout material and slide presentation by January 15, the latest date Allergan could print and ship the handout materials for the first meeting.

Dr. Boyts, who was now very familiar as to the type of presentation required, worked closely with the Williams organization, reviewing each section as it was completed, discussing changes and revisions until it was completed.

#### January, 1990

The January 15th deadline was met by Williams Marketing, and everything was in order for the first two Pathways Programs to be presented by Williams Marketing. The meetings were scheduled for February 3rd for the Southern College of Optometry in Memphis, Tennessee, and on February 4th for the University of Alabama School of Optometry in Birmingham.

#### February, 1990

With some trepidation based on the earlier pilot presentations, the Allergan staff was looking forward to the first presentations given by the Williams Marketing Group.

It became apparent soon after the program began, that the Williams Group was going to be able to deliver the program as it had been designed. Following the meeting, the post seminar evaluations were all 3's and 4's out a possible 4.0 rating. There were many positive comments from the students and faculty who attended.

However, a critique was still held immediately following the meeting, with the local practice management instructors, the AOSA trustee, Dr. Hopping, the Williams Marketing Group and the Allergan staff. After reviewing the program, it was the consensus of the group that it was a winner. No major changes were recommended, although there were many minor changes suggested -- change a slide, change slide order, shorten a certain portion of the presentation -- all things that are expected as any new program goes through minor modifications to make it better. The same format was used at subsequent meetings until there were no more changes.



### March - May, 1990

The Pathways Programs were successfully presented at all 14 remaining schools, and the program continued to improve throughout the year.

### SUMMARY OF 1990 PATHWAYS PROGRAM

- A total of 961 students attended the seminars.
- The Pathways Program received an overall rating of 3.54 out of a possible 4.0.
- Students rated Pathways at 3.50 out of 4.0 for the extent the program met their expectations.
- 98.6% of the students stated they would recommend the program to other students.
- Over 90% of the students rated the presenters either good or excellent. All presenter teams scored an average rating of 3.4 out of 4.0

### January, 1993

#### CURRENT SITUATION:

As with any dynamic program, the Pathways Program has evolved into a sophisticated program. Most of the schools have now made the Pathways Program a part of their practice management curriculum, with required attendance for the third-year class. Southeastern University, a new optometry school in North Miami Beach, Florida, is now included in the schedule, as are the two Canadian optometry schools, making a total of 19 schools where the Pathways Program are presented. The 61st program will be presented in January, 1993.

Allergan continues its financial support for the original Pathways in Optometry Program, and recently has made yet another commitment. Following an ASCO resolution to sponsor a two-day post-graduate practice management seminar targeting, but not limited to, recent graduates, AOSA has endorsed the program and AOA's support is being sought. Allergan has agreed to fund the development costs and the presentation of three pilot programs to be completed in the first half of 1993, which will be called Pathways in Practice. Additional programs will then be scheduled at major cities throughout the country.