

**MINUTES OF THE
SIXTH ANNUAL CONFERENCE
ASSOCIATION OF PRACTICE MANAGEMENT EDUCATORS
APRIL 1-2, 1995
MARRIOTT PAVILION HOTEL
ST. LOUIS, MISSOURI**

ATTENDANCE

Dr. R. Norman Bailey
Dr. Jack Bridwell
Dr. Carole Burns
Dr. John Classe'
Dr. James Hawley
Dr. Richard Hazlett
Dr. Craig Hisaka
Dr. Roger Kamen
Dr. Harry Kaplan
Dr. Donald Lakin

Dr. John Larcabal
Dr. W. Howard McAlister
Dr. Gary Moss
Dr. Stuart Rothman
Dr. Peter Shaw-McMinn
Dr. Morton Silverman
Dr. Lawrence Thal
Dr. Jeffrey Weaver
Dr. Mark Wright

AGENDA

FRIDAY, MARCH 31 -- Arrival and Hotel Check-In

- 3:00 Vans leave for tour of American Optometric Association Administrative Offices
- 4:00 AOA presentation on Practice Management Resources
- 5:00 Dinner sponsored by AOA Practice Management Committee

SATURDAY, APRIL 1

- 8:00 Continental Breakfast
- 8:30 Introduction of Participants
Administrative Announcements
Review of APME Goals and Objectives
Presentation of Planned Agenda
- 9:00 Committee Meetings
- 10:15 Break
- 10:30 Teaching Managed Care - Jim Hawley, Roger Kamen
- 11:30 Ideas for Improving Teaching Effectiveness - Gary Moss
- 12:00 Working Lunch
- 1:00 Committee Reports

Executive Board - Don Lakin
ASCO Restricted Fund Account - Don Lakin
Curriculum Committee
Research Committee - Howard McAlister
Curriculum Guide Project - Peter Shaw-McMinn
- 2:30 Ethics Presentation and Discussion - Norman Bailey

TOUR OF THE AMERICAN OPTOMETRIC ASSOCIATION

APME members were welcomed to the AOA facilities by CEO, Dr. Earle Hunter. Two tour groups were formed led by Diane Karl, AOA liaison to the Schools and Colleges of Optometry, and Dee Roderman, Administrative Director Practice Management and Opportunities. During the tours brief presentations were given by Ramona Clymer, Administrator of the Membership Services Center. She stated a desire to work together with Practice Management Educators to assist in teaching our students the value of AOA membership. There are many benefits members are not aware of and/or do not take advantage of. She distributed handouts on the AOA structure, AOA Student Membership Report, and Graduate Retention Report Membership Counts by College and Year. Tom Eichhorst, Legal Counsel for the AOA, discussed the political battles fought by the AOA representing all optometrists. He used his sense of humor to remind us that attorneys are our friends. The AOA legal staff is presently representing optometry in several lawsuits, including anti-trust litigation. Brigitte Kowalczyk, Head Librarian, and Sandy Smith demonstrated the various ILAMO resources available to us and encouraged that faculty take advantage of materials they have. The librarians also encouraged APME members to notify them when new books or audio\visual materials become available which they think would benefit optometrists. (Normally a publisher does not contact libraries regarding their publications).

AOA Practice Management Resources Presentation

A presentation was given on the resources available through the American Optometric Association. Gene Mitchell, Managing Editor of Optometric Economics spoke on changes in the journal. He encouraged the APME to provide him any recommendations or feedback on the publication. Harold Zinn, Manager of Marketing and Communications, reviewed a few of the materials available through the AOA order department. He also provided a packet of sample materials to use when teaching in the classroom. Barbara Fischer, Special Projects Manager, demonstrated four public relations special projects developed by AOA committees. A sample of the "1995 Save Your Vision Week" media kit was given to each in attendance for use in the classroom. The Chairman of the AOA Practice Management and Opportunities Committee presented a lesson plan including slides and a video which may be used to teach our students about Practice Management resources available through the AOA. A packet of materials was distributed which included the lesson plan, slides, videotape, Practice Resource Network sample data sheets, Partners in Vision monograph, "Establishing the Worth of an Optometric Practice" manuscript, and an AOA Stationery Catalog. The contact person for AOA Practice Management information is Dee Roderman (800) 365-2219.

| <u>NAME</u> | <u>SCHOOL</u> | <u>COURSE</u> |
|-------------------|---------------|--|
| John Larcabal | SCCO | Part time Practice Management I, II, III, IV team taught by the three of them. 20 hours each year. Coordinated by Peter. |
| Peter Shaw-McMinn | SCCO | Part time Practice Management I, II, III, IV team taught by the three of them. 20 hours each year. Coordinated by Peter. |
| Richard Hazlett | SCO | Part time Practice Management to 3rd year, two quarters. Ethics and orientation in first year and legal aspects taught by non-OD. He also teaches contact lenses full time. |
| Stuart Rothman | SUNY | Part time Vision Therapy Clinic 1 1/2 days a week. Teaches Practice Management III & Practice Management IV for five years. Practice Management IV may be eliminated next year. Students also get Practice Management I and public health classes. |
| Carol Burns | OSU | Part time teaches 1st, 2nd, and 3rd year Practice Management and staffs Binocular Vision Clinic. Jim Albright teaches 4th year Practice Management which will soon be moved to 3rd year. Dean Hill teaches intro course in ethics. |
| Mark Wright | OSU | Part time co-teacher 1st, 2nd, and 3rd year Practice Management with Carol Burns. |
| Craig Hisaka | UC-Berkeley | Part time 1 day per week in clinic for 20 years. Teaches public health part of Practice Management curriculum the past 10 years. |
| Larry Thal | UC-Berkeley | Part Time MBA. Teaches in general clinic, Contact Lens Clinic, and most Practice Management classes. |
| Norman Bailey | UH | Full time teaches primary care in the clinic, second year public health class and ethics. |
| Jack Bridwell | UH | Part time 60 hours to 3rd year, 45 hours to 4th year for past 4 years. |

Dr. Kamen reviewed his course lesson designed to teach the student to understand basic fundamentals of managed health care, optometry's possible role in managed care, analysis of managed care contracts and strategies to succeed in managed care. He led the group through a handout titled Optometry and Managed Care. This stimulated a discussion on managed care programs accepted by the optometry school clinics. The results of the survey are as follows:

WHAT MANAGED CARE PLAN &/OR HOW MANY DOES YOUR SCHOOL CLINICS ACCEPT? IS YOUR CLINIC BUSY WITH AN ADEQUATE PATIENT LOAD?

| <u>SCHOOL</u> | <u>NUMBER OF PLANS</u> | <u>NAME OF PLANS</u> | <u>CLINIC PATIENT LOAD</u> |
|---------------|------------------------|--|-----------------------------------|
| FSU | | VSP, Medicaid, Medicare | Peds;poor PC;low/avg cl;avg |
| NECO | ? | Any we qualify for and Medicare, Medicaid | |
| PCO | 10-12 | VSP, Medicare, Medicaid, Teachers, Retail clerks, police, fireman, etc | good |
| SCCO | 4 | VSP, Medicaid, Medicare, Block vision | avg/low |
| SCO | | VSP, Medicaid, Medicare, 2 additional | growing, less than desired |
| SUNY | 2 | Medicare, Medicaid | good |
| OSU | 4 | Medicare, Medicaid, OSU-HP, VSP | good |
| UC-B | | VSP, Medicaid, Medicare | average |
| UH | 3 | Medicare, Medicaid, VSP | low |
| UM-SL | | VSP, Medicare, Medicaid | poor |

IDEAS FOR IMPROVING TEACHING EFFECTIVENESS, DR. GARY MOSS, DR. STUART ROTHMAN

Dr. Rothman led the group through a lesson plan with six behavioral objectives used in appraising and purchasing an optometric practice. He distributed a handout titled "Association of Practice Management Educators" followed by his name and address. The students are persuaded as to the importance of the

- B. Performance
 - 1. Make required decisions.
 - 2. Think logically, clearly and consistently in support of analysis recommendations.
 - 3. Display common sense to observe the obvious and relevant issues.
HBS - Teaches students to apply common sense in an administrative context.
 - 4. Make use of data to form convincing arguments.
 - 5. Transcend descriptive scenario by applying concepts to broader alternative situations.
- II. Problem Oriented Approach
 - A. Brief Descriptive Summary
 - 1. List key facts and assumptions.
 - B. Statement of Problems
 - 1. Identify symptoms.
 - 2. Separate or related problems.
 - C. Causes of Problems
 - 1. Analyze and apply course concepts.
 - 2. Support conclusions or assumptions.
 - D. Possible Solutions
 - 1. Brainstorm with pros/cons.
 - E. Choice and Implementation
 - 1. What should be done and how.
 - 2. Is awareness of problem indicated and addressed.
 - 3. Be specific.
 - F. Justification
 - 1. Why student solution will work applying text concepts.
- III. Analytical Approach (no solution)
 - A. What are the facts?
 - B. What can be inferred from facts?
 - 1. Values, attitudes, requirements.
 - 2. Success criteria.
 - 3. Hypothesize using learned concepts.
 - 4. What is happening and why.
 - C. What can be drawn from case?
 - 1. Illustrate models or theory.
 - 2. Limitations of a model or theory.
 - 3. Crucial points needing further discussion.

Dr. Moss conducted a sample discussion of a case analysis using a problem oriented approach. The students prepare by reading a case study developed and sold by Harvard Business School. The instructor asks, "Jack, what's going on here?" The student gives an introduction of the problem. The instructor asks the class, "What are some of the problems?" The class brainstorms on the problems, the instructor listing them on an overhead. The instructor next asks, "What are possible solutions?" The class brainstorms on solutions, then analyzes them as to pros/cons of each course of action. The instructor makes resources available to the students such as articles and parts of text xeroxed. Finally the students make choices and explain how they would implement the course of action. The students must justify their choice.

Dr. Bridwell reported on the Curriculum Committee's decision to gather and distribute Practice Management materials provided by industry. He stated that some instructors are utilizing materials which may be of use to all of us. He asked that the APME send him a list of materials they use. He will then assemble the materials and explore the availability of them for distribution to each school.

Dr. Shaw-McMinn distributed the second rough draft of the curriculum guide. He reviewed the format agreed upon by the Curriculum Committee. Changes included the separation of lesson plans into three courses. The three courses were labeled Practice Management I, II, III. Each was briefly described and designed to give during the first, second, and third academic years. The lesson plans were distributed in greater detail than in the first rough draft. The topics "Expense Sharing" and "Associateship/Partnership" included examples of test items. Dr. Shaw-McMinn explained that the Curriculum Committee hopes to include overheads and test items with each lesson plan.

When reviewing the final section which lists curricular elements he showed that Practice Management III did not have a list. This was because the elements will follow the text book. Hence, he expects a radical revision in the curriculum guide once the textbook is published. Contributors were thanked and more contributions were solicited.

Dr. Shaw-McMinn mentioned that use of the activities, handouts, and test questions would be facilitated by having the curriculum guide on a computer disk. He surveyed the attendees on the preferred word processing software. He will transfer the guide to each requested software and mail to the instructor. For your information the survey results are as follows:

**WHAT WORD PROCESSING SOFTWARE DO YOU USE?
WHAT SIZE OF DISK?**

| <u>NAME</u> | <u>SOFTWARE</u> | <u>DISK SIZE</u> |
|------------------|--|------------------|
| Norman Bailey | Microsoft Word 6.0 Word 5.0 for MAC | 3 1/2 |
| Jack Bridwell | Microsoft Word 5.0 | 3 1/2 |
| Jim Hawley | Word Perfect 5.1 & 6.0 | 3 1/2 |
| Richard Hazlett | Word Perfect 5.1 | 5 1/4 |
| Craig Hisaka | Word 5.0 for MAC | 3 1/2 |
| Roger Kamen | Microsoft Word, Word for Windows | 3 1/2 |
| Harry Kaplan | Word Perfect | 3 1/2 |
| Howard McAlister | Word 6.0 for MAC? | 3 1/2 |
| Gary Moss | Word for MAC | 3 1/2 |

practitioners and industry to be more efficient. Efforts to allocate resources will include: 1) Prioritization of account need, and 2) Return on investment.

Mr. Trunick's presentation also involved discussion on how APME should take more responsibility and ownership for "Pathways in Optometry" delivery and execution at each school. He distributed a report titled "Allergan/APME Pathways in Optometry". He reviewed the contents of the report. Mr. Trunick thanked the APME for past support of the Pathways program. He emphasized that Allergan wishes to meet our needs in the school curriculum. If this means a change in the administration of the Pathways program at a particular school, Allergan wishes to encourage dialogue to facilitate the change. A motion was passed unanimously asking Mr. Trunick to write a letter to APME members asking each school to; 1) Confirm the date for 1995-96 Pathways in Optometry programs, and 2) give recommendations for change in the program.

Mr. Trunick indicated he will draft the letter.

Mr. Trunick's presentation ended with an ovation. Chairman Dr. Lakin thanked Mr. Trunick and Allergan for their continued support of our efforts. A second round of applause demonstrated the gratitude felt by attendees.

DINNER AT HANNIGAN'S

Dinner was served at Hannigan's restaurant on LaClede's Landing--an eight block walk from the hotel. It served as a nice break after being in session for nine hours and gave a chance to reflect on the activities of the day and socialize.

SUNDAY, APRIL 2

PUBLICATION COMMITTEE, DR. JOHN CLASSE'

Dr. Classe' reported on the survey he has conducted over the past five years. He demonstrated a consistent pattern for the past five years at Ohio State and Alabama, the two schools which consistently participated in the study. The survey showed most OSU graduates stay in the state of Ohio, while most UAB graduates leave Alabama.

Optometrists continue to be most influential in helping graduates find their practice mode upon graduation.

John will write an article for Optometric Economics citing the APME as the source of data. The article will give OD's some idea as to what recent grads receive in income.

The APME agreed to have every school send out the survey in two to three years. After much discussion, Dr. Classe' felt December was still the best time to send out the survey.

Textbook

Dr. Classe' is coordinating the second edition of his book Legal Aspects with our textbook. He feels Legal Aspects is best targeted for use with first and second year students. He

After much discussion, a motion was made and passed which stated, "The APME would like to encourage its members to have the AEC's In Eyecare program presented at their schools. Dr. Larcabal will approach VICA for seed money to fund the establishment of the program".

COMMITTEE RECOMMENDATIONS

Curriculum Committee

Dr. James Hawley was chosen as Chair, with Dr. Carol Burns and Dr. Mark Wright serving as Vice-Chairs. Committee members include Dr. Moss, Dr. Bridwell, Dr. Shaw-McMinn, Dr. Silverman, and Dr. Hazlett.

Dr. Burns is coordinating efforts to develop instruments for measuring our teaching effectiveness and explore ways to relate this to measuring the patient care delivered in our offices. Dr. Wright will obtain a copy of the ASCO Summit report as well as gather information on any trends within the profession which effect the Practice Management Curriculum. Dr. Bridwell asks that everyone send him a list of Practice Management materials provided by industry. Dr. Shaw-McMinn will continue developing the Curriculum Guide and asks anyone with lesson plans to send them to him.

Research Committee

Dr. McAlister was chosen as chairman. Members include Dr. Weaver, Dr. Thal, Dr. Kamen, and Dr. Classe'.

The committee will develop a program in which to distribute the research stipends offered by Vistakon. Dr. Thal will draft a letter to Practice Management educators and copy each school's dean which explains the program. Vistakon is willing to provide grants of \$500 to students conducting research on Practice Management.

The Research Committee will investigate places to store the research thesis's that were to be kept at the Bennett Center. ILAMO will be contacted as to their interest.

The survey conducted by Dr. Classe' in the past will be conducted by the Research Committee.

New Projects Committee

Dr. Larcabal is the chair. Dr. Larcabal and Dr. Rothman will explore the possibilities of developing a program with VICA.

Ethics Liaison to the AOA Committee

Dr. Bailey will continue with this post. Dr. Lakin asked for input from the APME to Dr. Bailey regarding our concerns. Dr. Classe' pointed out he is also on the AOA Ethics Committee and the committee is doing a good job with the information we supply them.



April 7, 1995

Dr. Don Lakin
Ferris State University
College of Optometry
901 South State Street
Big Rapids, MI 49307

Dear Don:

We are very committed to optometric education. We have fully supported the APME annual session for 5 years. We believe the APME is making progress in delivering healthcare business management expertise to students of optometry.

We expect our support has:

- Endowed this session.
- Delivered a textbook to fund future sessions.

As a result we are planning to support *Pathways in Optometry*® education as part of APME programming for 1995-96. We expect the APME input session to be self funding and we have no plans to support the APME session for 1996.

I personally recognize and genuinely appreciate your efforts along with Dr. Larry Thal and Dr. Richard Hopping to direct APME's current and future plans.

Best regards,

Jim Trunick
Director, Marketing Services

- u of H wants smelly in it place before
droppy - unhappy 2 last one

cc: Dr. Richard Hopping
Dr. Larry Thal