ASSOCIATION OF PRACTICE MANAGEMENT EDUCATORS

MEMORANDUM

TO: Practice Management Educators

FROM: Don Lakin, Chair, Executive Committee

SUBJECT: APME Seventh Annual Conference--Minutes

DATE: May 22, 1996

Enclosed are the minutes of our Seventh Annual Conference. I'm sure that all of you who attended agree with me that it was by far the best meeting we've had to date. Much of the credit goes to Vistakon for their sponsorship and inviting us to Ponte Vedra Beach. I want to thank all of you for your enthusiastic participation. Without your input it would not have been successful.

Please review the minutes as published and let me know about any mistakes or admissions. Many of the committees have projected plans to take "Practice Management into the 21st Century". Look at the committee assignments and see where you fit in. If you are unhappy with your assignment please call me and let me know where you would rather be.

During our meeting there was some discussion of mission and goals of A.P.M.E. that would take us into the 21st century. With our full agenda we did not have the opportunity to address this subject. I've talked with Jim Albright and he has agreed to chair a new committee on Mission and Goals. I would encourage all of you to provide input to Jim on this subject for next years meeting.

Again, thanks for your work this past year; special thanks to George Mertz and Vistakon for their sponsorship. I couldn't have gotten out these minutes without Dr. Shaw-McMinn's good note taking ability-Thanks Pete! I will keep you informed of activities through the year and plans for the Eighth Annual Conference.

MINUTES OF THE

ASSOCIATION OF PRACTICE MANAGEMENT EDUCATORS APRIL 18 - 21, 1996

SEVENTH ANNUAL CONFERENCE

THE LODGE & BATH CLUB AT PONTE VEDRA
PONTE VEDRA, FLORIDA

ATTENDANCE:

DR. ROGER KAMEN/FERRIS STATE UNIVERSITY, DR. DONALD LAKIN/ FERRIS STATE UNIVERSITY, DR. NEIL GAILMARD/ILLINOIS COLLEGE OF OPTOMETRY, DR. JACK BENNETT/INDIANA UNIVERSITY, DR. IRIS CABELLO/INTER-AMERICAN UNIVERSITY, Dr. GARY Moss/Renais-SANCE FARM, DR. MORTON SILVERMAN/NOVA SOUTHEASTERN UNIVER-SITY, Dr. HARRY KAPLAN/PENNSYLVANIA COLLEGE OF OPTOMETRY, DR. JOHN LARCABAL/SOUTHERN CALIFORNIA COLLEGE OF OPTOMETRY, DR. PETER SHAW-McMinn/Southern California College of Opto-METRY, DR. RICHARD HAZLETT/SOUTHERN COLLEGE OF OPTOMETRY, DR. HAROLD FRIEDMAN/SUNY COLLEGE OF OPTOMETRY, DR. JAMES ALBRIGHT/THE OHIO STATE UNIVERSITY, DR. MARK WRIGHT/THE OHIO STATE UNIVERSITY, Dr. CAROLE BURNS/PROFESSIONAL VISIONCARE, DR. JOHN CLASSE/UNIVERSITY OF ALABAMA, DR. CRAIG HISAKA/UNIVERSITY OF CALIFORNIA, DR. LAWRENCE THAL/ UNIVERSITY OF CALIFORNIA, DR. R. NORMAN BAILEY/UNIVERSITY OF HOUSTON, Dr. JACK BRIDWELL/UNIVERSITY OF HOUSTON, Dr. W. HOWARD MCALISTER/UNIVERSITY OF MISSOURI-ST. LOUIS, DR. JEFFREY L. WEAVER/UNIVERSITY OF MISSOURI-ST. LOUIS, Dr. GEORGE W. MERTZ/VISTAKON

AGENDA:

ASSOCIATION OF PRACTICE MANAGEMENT EDUCATORS SEVENTH ANNUAL CONFERENCE Sponsored by VISTAKON™

Practice Management into the 21st Century

AGENDA

Thursday, April 18, 1996

All Day Educators arrive. Ground travel to The Lodge & Bath Club

at Ponte Vedra Beach via East Coast Transportation.

Check in.

Note: Most APME members will tour Vistakon manufactur-

ing facilities en röute to the hotel.

7:00-10:00 pm

Welcome Reception, The Conservatory.

Friday, April 19, 1996

7:00 am Buffet Breakfast, Hotel Lobby.

7:45 am-12:00 noon Vistakon Program, Palm Room.

7:45 am Call to Order/Announcements.

Dr. George W. Mertz

Director, Academic Affairs

7:55 am Official Welcome/Corporate Update.

Dr. Stanley J. Yamane

Vice President, Professional Affairs

8:15 am Contact Lens Industry and Consumer Eye Care Trends.

Dr. Howard B. Purcell

Director, Professional Affairs

9:15 am 1996 Vistakon Marketing Program.

Mr. Richard de Wilde Vice President, Marketing

10:00 am Break. Group Photo.

10:30 am Blueprint for Team Effectiveness.

Mr. Gale Stoner

MileStone Advisory Group

11:30 am

Practice Management and the Computer.

Mr. C. Edward Buffington OfficeMate® by Marchon

12:00 noon

Vistakon Program Adjournment.

12:00 noon

Lunch followed by afternoon recreation. Some members depart immediately for afternoon recreation with box

lunches provided.

1:00 pm - Team A

Tee times, golf tournament at Marsh Landing Golf Course

1:07 pm - Team B

(scramble format).

1:14 pm - Team C

1:21 pm - Team D 1:28 pm - Team E

7:00 pm

Departure from the front of The Lodge & Bath Club.

7:15 pm

Cocktails/Dinner. The Augustine Grille at the Marriott at

Sawgrass Resort.

Saturday, April 20, 1996

7:00 am

Buffet Breakfast, Hotel Lobby.

8:00 am

Call to Order/Administrative Announcements

Dr. Donald Lakin Chair, APME

8:05 am

Review of APME Goals and Objectives.

Presentation of Planned Agenda.

8:30 am

How to Open Cold without Freezing to Death in the 90s.

Dr. Donna D. Sherrill, Dr. James W. Watts

Jacksonville Optometrists

10:00 am

Break.

10:15 am

APME Committee Meetings.

12:00 noon

Working Buffet Lunch.

1:00 pm APME Committee Reports:

Executive Board - Dr. Don Lakin

Curriculum Committee - Dr. Carole Burns Research Committee - Dr. Howard McAlister New Project Committee - Dr. John Larcabal Publication Committee - Dr. John Classé Curriculum Guide Committee - Dr. Peter

Shaw-McMinn

Ethics Committee - Dr. Norman Bailey

3:00 pm Break.

3:15 pm Health Care Reform and Managed Care into the 21st

Century.

Dr. John McClane

AOA State Health Care Legislative Committee

4:15 pm Beyond the Lecture Format - Dr. Gary Moss.

Financial Valuation in Practice Sale Decisions in a Managed

Care Era.

6:30 pm Program Adjournment.

7:00 pm Cocktails/Dinner, The Conservatory.

Sunday, April 21, 1996

7:00 am Buffet Breakfast, Hotel Lobby.

8:00 am Call to Order/Announcements, Palm Room.

8:05 am New Projects Committee - Dr. John Larcabal.

9:00 am VICA Public Relations Marketing Program - Mr. Fritz

Koerting, Mr. Bill Wilson, Dr. Craig Hisaka, Dr. Jack

Bridwell, Dr. Peter Shaw-McMinn.

10:00 am Break.

10:30 am

Presentation of Committee Recommendations and Final

Report.

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Action on Final Recommendations.

New Recommendations.

Election of Board.
Committee Changes.
Committee Assignments.

Other Administrative Announcements.

12:00 noon

Program Adjournment.

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All afternoon

Educators depart for airport. Box lunches will be provided for those with early departures. Lunch will be available to others. Some APME members will tour Vistakon manufacturing facilities *en röute* to airport.

C:\WP\GMERTZ\APME96G.AGN April 17, 1996

TOUR OF VISTAKON MANUFACTURING FACILITIES

APME members toured the disposable lens manufacturing facility on Richard Street and Deerwood Park. This was followed by a Welcome Reception in the Conservatory at the Lodge.

VISTAKON PROGRAM

Dr. Mertz called the meeting to order and made necessary announcements. He explained his role at Vistakon and then introduced Dr. Yamane, who welcomed us and presented an update on Johnson & Johnson. Dr. Purcell followed with a presentation on the Contact Lens Industry and Consumer Eye Care Trends. A hard copy of his slides is attached to the minutes, and slides are available through Dr. Mertz if you want to use them with your classes or share them with other faculty members. Mr. Richard deWilde discussed the 1996 Vistakon marketing program.

Blueprint for Team Effectiveness, Gale Stoner

Mr. Stoner gave part of a presentation he targets toward the optometry student. See handouts for an outline of what he covered. Dr. Mertz invited the APME to contact him if anyone is interested in bringing Mr. Stoner to their school to give this presentation.

Practice Management and the Computer, Mr. C. Edward Buffington

Mr. Buffington gave a brief presentation on the use of computers in managing a practice. He announced a generous gift of one computer hardware system and OfficeMate software to each optometry school. By calling him he will also be available to give a presentation at each school on the use of the software.

Afternoon Recreation and Box Lunch

APME members joined Vistakon staff for a Select-shot golf tournament at the Marsh Landing Golf Course. Other recreation options were Tour of St. Augustine, and Spa/Message.

Dinner at the Augustine Grille at the Marriott at Sawgrass Resort

Following dinner hosted by Vistakon prizes were distributed to the golf tournament participants. Crying towels and trophies were presented to the winners.

APME MEETING

ADMINISTRATIVE ANNOUNCEMENTS

Chairperson Lakin called the meeting to order at 8:01. He expressed thanks to Vistakon for their sponsorship, the Friday program, and the hospitality enjoyed thus far. He greeted all members and asked for information from three new faces in attendance.

Dr. Jack Bennett, Dean at Indiana announced the new curriculum at IU increased the number of credit hours by 21%. They have 3-4 courses covering practice management. He teaches the first year Orientation course and Socio-economic Aspects of Optometry. Ed Marshall teaches Legal and Professional Aspects of Optometry. The Community Health and Environmental Optics course also cover some practice management.

Dr. Harold Friedman, SUNY, is Chief of VT and teaches the fourth year course. They have 25 hours in the third year and 25 hours in the fourth year. SUNY tries to get the students into clinics from day one. Their courses are similar to Indiana.

Dr. Iris Cabello, InterAmerican University, in August is teaching Practice Management for the first time to third year students. She is Director of the Patient Care Department and teaches contact lenses.

Dr. Lakin then reviewed the objectives of the organization and suggested we may want to revisit these and/or consider a mission statement.

Dr. John Classe' spoke on an added objective to the APME be to get new knowledge on Practice Management aspects.

How to Open Cold without Freezing to Death in the 90s. Dr. Donna D. Sherrill, Dr. James W. Watts

Dr. Sherrill and Dr. Watts gave a presentation that has been well received at Optometry schools. See outline for topics covered. Following the presentation, Dr. Mertz offered Vistakon sponsorship if we would like the lecture at our Optometry schools.

APME COMMITTEE REPORTS

Executive Board, Dr. Don Lakin

Dr. Lakin presented the activities of the past year. Correspondence with Allergan was discussed, and this year's sponsorship by Vistakon was reviewed.

The practice management restricted account with A.S.C.O. as of 4/16/96 was \$91,555. \$56,355 of this is in a U.S. Treasury Note. Since the meeting, V.I.C.O. has contributed \$25,000 to our account.

Dr. Classe' asked about who controlled the investing of our funds in the ASCO accounts.

Dr. Hisaka brought up the need for future policy on dealing with industry requests.

Curriculum Committee, Dr. Carol Burns

- Dr. Shaw-McMinn distributed computer disks containing the latest rough draft of the Curriculum Guide. He reviewed the format of i) lesson plan elements ii) lesson plans for a four year program iii) curricular elements for each year. The elements for the third and fourth year were not listed since these would follow the text book. He concluded by stating that since the text book is now complete, he will be calling the contributing authors to develop lesson plans which follow the text. The goal is to have a curriculum guide to complement the text book by the next meeting. The guide will include a section on overheads and another on test questions.
- Dr. Jack Bridwell reported on the objective of consolidating all materials available to us from industry, government and optometric organizations. He will write a letter to these entities requesting a list of materials they wish to provide. He will also learn whether or not these materials have been sent to the students. Dr. Bridwell requests that APME members forward lists resources from these groups which are now presenting being used. Once the curriculum committee has compiled all the resources, a menu will be created from which APME members can choose from. The committee will consider hands on demonstrations of use of the resources at future APME conferences.
- The committee discussed how Gale Stoner's presentation could be integrated into the curriculum at each optometry school. The general feeling is that the presentation must be developed into a lesson plan including activities and handouts. The curriculum committee would like to work with him to develop handout materials for the student's to use to continue their education beyond the presentation.
- The committee is interested in developing Computer assisted instruction to complement classroom teaching. Perhaps Office-mate could be approached as to the possibility of developing the computer software to allow independent learning.
- 5) The committee is pursuing assessing the variability and reliability of teaching methods. Dr. Burns gave a presentation on teacher evaluations. (See handout). The committee intends to investigate methods used by education

in measuring the effectiveness of lesson plans. There was discussion as to the appropriateness of a speaker for next year's conference on the topic of Research and the Improvement of Education.

Trends in Optometry which may effect the teaching of Practice Management were discussed. Dr. Mark Wright gave us a presentation on the trends of i) managed care ii) refractive surgery and iii) mass merchandising. (See handout).

Research Committee, Dr. Howard McAlister

- 1) The committee is interested in seeking funding to research the influence of managed care on optometric practices.
- 2) There are four \$500 research grants available from Vistakon this year. Dr. Larry Thal is developing protocol to be used in applying for the grants. Presently, send funding requests to Larry.
- 3) The research thesis papers from Berkeley will continue to be stored at the Bennett Center.

New Projects Committee, Dr. John Larcabal

- 1) The committee gave four pilot program presentations on the use of VICA marketing materials in teaching Internal/External marketing. A presentation was given on Sunday. (See minutes concerning this presentation).
- 2) The committee is investigating alternate programs to replace the Pathways in Optometry program. See Tom Bowen's presentation for his suggestions.
- The committee is developing a lesson plan on marketing contact lens which may be available for use at each school. The program will cover how contact lenses can meet patient's needs, enhance their lifestyle and improve their quality of life. Cost/profit analysis will also be reviewed.

Publication Committee, Dr. John Classe'

The book is at Buttersworth and is the best practice management book written to date although there is room for improvement. The publication committee is looking at using this book for one to two years, followed by a second edition. The book will help the APME reach the goal of standardizing the practice management curriculum at the schools.

The book is 32 chapters and every school contributed to it. Dr. Hopping is writing the forward. It is dedicated to Harris Nussenblatt. The book should be ready and available by December. The book will be approximately 500 pages and cost in the range of

eighty dollars. The profits will go to the APME ASCO fund. In conclusion, we now have a body of knowledge and new information which will service to enhance our credibility in academia. Dr. Classe' received a well deserved ovation for his efforts as editor.

Ethics Committee, Dr. Norman Bailey

The committee reported that the ad hoc Optometric Ethics Educators Committee will be releasing "Recommended Curriculum for the Teaching of Professionalism and Ethics in the Schools and Colleges of Optometry." This committee has held four meetings since 1991 for the purpose of developing this recommended curriculum. The suggested implementation of the curriculum will, among other things, recommend the incorporation of ethical discussions throughout the didactic and clinical professional program.

It is the opinion of the Ethics Committee of APME that many topics within the practice management curriculum offer an excellent opportunity for ethical discourse. The Ethics Committee recommends that a project be developed by APME to develop guidelines for this discourse and to identify specific ethical issues and dilemmas in the practice management areas to be covered in the curriculum. A case-study approach may be the best format to use for this educational activity.

Health Care Reform and Managed Care into the 21st Century, Dr. John McClane

Dr. McClane gave a presentation on lectures available through the AOA State Health Care Legislative Committee. These presentations are funded by the AOA and can be arranged to be given at the optometry schools. He mentioned that the AOA Eye Care Benefits Committee also has funding to give lectures. (See his handout).

Beyond the Lecture Format, Dr. Gary Moss

Dr. Moss gave a presentation on enhancing our teaching ability. He reviewed the three meta-levels of learning; i) Rote (memory) ii) Meaningful and integrated iii) Critical thinking. He pointed out we often teach at the low level of rote memorization.

Dr. Moss related this levels of learning to the need for developing useful learning level objectives. In order to teach well, the first step is knowing what the student is to learn. The the levels of objectives according to Bloom's Taxonomy are; i) Knowledge ii) Comprehension iii) Application iv) Analysis v) Synthesis vi) Evaluation. Dr. Moss gave a demonstration of how a case study can be used to teach higher levels of learning. See the handouts entitled, "Some Suggestions

for Writing a Business Case" and "Start of Purchase a Practice Exercise?"

Dr. Moss explained the teaching of Net Present Value and reviewed the exercise "Valuing a \$10,000 opportunity". (See handouts).

Dr. Moss covered characteristics of an excellent professor. He passed out two self-evaluation tools. He emphasized the continual need to evaluate one's teaching ability and improve. He encouraged the APME to complete the self-assessment tool. Note the attached handout on how to grade your self-assessment evaluation.

NEW PROJECTS COMMITTEE PRESENTATION, Dr. John Larcabal

Mr. Tom Bowen from Williams Marketing was invited to give a presentation on a program to replace the Pathways in Optometry program. The name for his lecture is "Real Practice", A program About Real Life After Optometry School. (See Handout).

Mr. Bowen's presentation was followed by a discussion about the actual status of the Pathway's program. A phone call to Jim Trunick later confirmed that Pathways is no longer available to the schools.

Dr. Yamane reported that Vistakon is presently discussing a new program with Williams Marketing. The program would be sponsored by a consortium consisting of Officemate/Marchon, Alcon and Vistakon. A one day program would be given on a Saturday at each optometry school. Saturday afternoon, established practitioners from the area would be invited to interact during the student program. On Sunday a practitioner program would be held. This would keep travel costs down for the presenters. Dr. Thal discussed the value of having a program with both students and established practitioners present.

Dr. Yamane looks at the program as a supplement to the APME curriculum. As such, the APME would have input on the content of the program. He feels that it is important that students attendance is required, that where possible the presentation is held on campus to keep costs down, and a mini-exhibit hall be held for students and practitioners where sales reps can interact with the attendees.

The value of a program such as pathways was discussed, it was moved, seconded and unanimously passed, "1) the APME felt the pathways program has been of great value to our students and curriculum 2) to indicate strong support for a program similar in intent 3) to support VISTAKON for moving forward in developing such a program."

VICA Public Relations Marketing Program, Mr. Friz Koerting, Mr. Bill Wilson

Dr. Shaw-McMinn led the APME through the lesson plan successively used at Ferris, Houston, Berkeley and SCCO. (See handout materials). He reviewed the Orientation part of the lesson plan. Dr. Jack Bridwell covered the Persuasion part of the lesson plan. Dr. Hisaka and Dr. Larcabal demonstrated the Instruction portion. Dr. Shaw-McMinn discussed the feedback from the Closure part of the lesson plan. Mr. Koerting and Mr. Wilson explained VICAs participation in the program. There was a consensus that the program was well done and should be considered in part of the curriculum at each school.

Dr. Larcabal will contact the schools to arrange a presentation. VICA has funding to send a APME speaker and one VICA representative to all schools during the next two years. Following this period, a re-evaluation by the VICA board will occur and future funding considered.

Dr. Larcabal thanked Mr. Koerting and Mr. Wilson for their generous support of APME.

AOA New Practitioner Program

Dr. Shaw-McMinn reported on an AOA New Practitioner Advisory Committee which is investigating a program which the American Pharmaceutical Association developed for their members. The program involves the mailing of a New Practitioner Career Manager Manual composed of a three ring notebook with two chapters of information and a newsletter which is distributed to senior students. Following graduation, quarterly newsletters are sent to the recent grads accompanied by additional chapters to the manual. The attractive aspect of this program is that practice management instruction can continue after graduation. As practice management instructors, we all know that a lot of what we teach is irrelevant until after the student graduates. This program would afford the APME the opportunity to develop a curriculum that could continue after graduation.

There is a possibility that this program could be a part of the two day program developed by Vistakon. Perhaps the Career Manager Manual could be presented at the student program and followed up with quarterly newsletters. Similar material could be developed for established practitioners.

The AOA New Practitioner Advisory Committee will be meeting for the first time at the end of May. Dr. Shaw-McMinn will keep APME informed as to the progress. APME is assured of having direct input into the curricular content of such a program.

SUMMARY OF ACTION ITEMS ON COMMITTEE RECOMMENDATIONS

Curriculum Committee

- 1. The curriculum guide will be completed by April 1997.
- 2. The committee will work with Gale Stoner to develop a lesson plan for use at school presentations.
- 3. New Projects committee will work with Vistakon to facilitate the incorporation of Gale Stoner's presentation into the school curricula.
- 4. The committee will approach OfficeMate concerning the development of Computer Assisted Instructional software for independent learning.
- 5. APME members refer to the committee resources used in the classroom which are available from industry. A menu of options will be completed and hands-on demonstrations scheduled at next year's conference.
- 6. The committee will pursue a speaker for next year's conference on the topic, "Research and the Improvement of Education".
- 7. Lesson plans will be distributed at next year's conference on "Recent Trends Affecting Practice Management Decision-making."

Research Committee

- 8. The committee will seek funding to research the influence of managed care on optometric practices.
- 9. A protocol will be developed to be used in applying the research grants made available by Vistakon.

New Projects Committee

- 10. Dr. Larcabal will contact interested schools to schedule the VICA sponsored marketing lecture.
- 11. The committee will work with Vistakon to develop a program to replace Pathways in Optometry.
- 12. A lesson plan will be created on marketing contact lenses.
- 13. A lesson plan will be created to teach the cost/profit analysis of contact lens prescribing.
- 14. Dr. Shaw-McMinn will keep the APME informed as to the progress of the AOA New Practitioner's Program.

Publication Committee

15. The text book will be used in the classroom and modifications recommended for the second edition.

Ethics Committee

- 16. The "Recommended Curriculum for the Teaching of Professionalism and Ethics in the Schools and Colleges of Optometry" will be distributed to APME upon completion.
- 17. The Ethics committee will identify specific ethical issues and dilemmas in practice management areas and develop case studys to use in the classroom.

General Session

- 18. Dr. Thal and Dr. Kaplan will explore the possibility of joining with the Ophthalmic Optics Educators and Contact Lens Educators in preparing a statement on the need for emphasis in curricula on spectacle and contact lenses, currently being overshadowed by therapeutic pharmaceutical agents.
- 19. Don will thank Vistakon for their support and will encourage their sponsorship for the eighth annual conference during the same time period. If Vistakon believes it would be mutually beneficial, perhaps half a day could be spent with contact lens educators to discuss issues of common interest.
- 20. It was moved, seconded, and unanimously passed, "the APME supports efforts to promote and do meaningful research in the areas of practice management and seek assistance to formulate meaningful research protocol for studying the effects on the economics and quality of care by managed third party care."

ELECTION OF BOARD

It was moved, seconded, and unanimously passed that Dr. Lakin continue to serve as Chair for one more year and Dr. Shaw-McMinn continue to serve as Vice-Chair. Dr. Thal as immediate past Chairman serves on the executive committee. Committee chairs will remain as in the past year.

COMMITTEE APPOINTMENTS

Curriculum Committee

Dr. Carol Burns, Chair

Dr. Mark Wright

Dr. Gary Moss

Dr. Jack Bridwell

New Projects Committee

Dr. John Larcabal, Chair

Dr. Stu Rothman

Dr. Iris Cabello

Dr. Richard Hazlett

Curriculum Committee (cont.)

Dr. Peter Shaw-McMinn

Dr. Mort Silverman

Dr. James Hawley

Research Committee

Dr. Howard McAlister, Chair

Dr. Larry Thal

Dr. Roger Kamen

Dr. John Classe'

Dr. Harry Kaplan

Publication Committee

Dr. John Classe', Chair

Dr. Craig Hisaka

Dr. Ron Rounds

Dr. Larry Thal

Administrative Announcements

Dr. Lakin thanked everyone for their attendance and participation. There were many comments on how much we all appreciated Vistakon sponsorship, the time frame, the location, and working with people who understood optometry.

It was moved, seconded, and unanimously passed that "A.P.M.A. express their thanks to George Mertz and Vistakon for hosting our seventh annual conference - the best meeting by far to date and acknowledge we couldn't have done it without their sponsorship".

Adjournment

The conference was adjourned at 11:58 a.m.

Attachments

Updated member list
Letter to Dr. Mertz
Letter from Tom Bowen
Letter to Bill Wilson
Letter from Bill Wilson to A.S.C.O.
Hard copy of Howard Purcell slides
Instructor Scoring from Gary Moss

Ethics Committee

Dr. Norm Baily, Chair

Dr. Jack Bennett

Dr. Harold Friedman

Mission and Goals Committee

Dr. James Albright, Chair

Dr. Jeff Weaver

Dr. John Larcabal

Dr. Neil Gailmard

Dr. John Rumpkakis

5/9/96

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OSU/614-292-1222 (Fri.)
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VISTAKON

Dr. George W. Mertz
Director, Academic Affairs
Vistakon
4500 Salisbury Road, Suite 300
Jacksonville, FL 32216
0/904-443-1000
F/904-443-1252

ASSOCIATION OF PRACTICE MANAGEMENT EDUCATORS

May 7, 1996

Dr. George W. Mertz Director, Academic Affairs Vistakon 4500 Salisbury Road, Suite 300 Jacksonville, FL 32216

Dear George,

On behalf of the entire A.P.M.E. membership and myself I want to thank you and Vistakon for hosting our seventh annual conference at Pointe Vedra Beach. By far it was our best meeting to date.

The Friday Vistakon presentation brought our membership up to date as to what is happening in the contact lens market, a very important part of optometric practice. I'm sure much of this information will be incorporated at many of our schools.

Showcasing some of the programs currently being offered by Vistakon was also helpful. You were present for part of the discussion and evaluation of these programs by our members. Summaries of these evaluations will be in our annual minutes which will be distributed within three weeks.

Sunday in our closing session a resolution was enthusiastically presented and unanimously approved thanking Vistakon for the hospitality enjoyed support given to the A.P.M.E. The entire membership has asked me to petition Vistakon to continue sponsorship for our eighth annual conference during the same time frame in 1997.

Thank you again for all the support you've given A.P.M.E.

Sinderely

Donald H. Lakin, O.D., Chair

cao

cc: Dr. H.B. Purcell Dr. S.J. Yamane "Making Successful Practices More Successful"

April 23, 1996

Donald Lakin, O.D. Professor, Ferris State University College of Optometry 1310 Cramer Circle Big Rapids, MI 49307-2738

Dear Don,

What a pleasure it was spending some time with you and your cohorts of the APME. Although I was only in your meeting a brief time, it sounds as though you had an excellent endeavor.

I want to formally thank you for allowing Williams Marketing and Management to participate. It was great to see old friends, and we appreciate the opportunity to share our thoughts regarding the "next chapter" with our student (and practitioner) program.

Shortly after I returned, Brad Williams contacted Jim Trunick at Allergan to make sure that there had not been some misunderstanding. We were correct -- Allergan is not funding the program, and Allergan is well aware and has no problem regarding our discussions with VISTAKONTM and the other companies involved. In other words, we have a clean slate!

Again, Don, it was great to see you again. I look forward to talking with you soon.

Sincerely,

Thomas L. Bowen Vice President

cc: Brad Williams, O.D., F.A.A.O.

Peter Shaw-McMinn, O.D.

ASSOCIATION OF PRACTICE MANAGEMENT EDUCATORS

May 7, 1996

Mr. William J. Wilson Director of Public Relations Vision Council of America 1800 N. Kent Street, Suite 904 Rosslyn, VA 22209-2152

Dear Bill,

On behalf of myself and the entire membership of A.P.M.E. I want to thank you for V.I.C.A.'s support of our organization.

The program on marketing that was presented at our meeting and is being "taken on the road" to our schools and colleges is outstanding. The A.B.C.'s of eyecare has done so much to bring knowledge of the need for annual eye care to parents. It has been a real service to the entire ophthalmic community.

Envision Yourself is already an important teaching tool in many of our institutions. Presbyopia is destined to be used extensively. Congratulations on a job well done.

Last but not least I want to thank you for your financial support. I've received your correspondence with Marty Wall and we really appreciate your contributing to making our organization a financial viable entity. We also appreciate your approved grants for 1997 & 1998.

Thanks again for your support.

Sincerely,

Donald H. Lakin, O.D., Chair

cao



May 2, 1996

Mr. Martin A. Wall Executive Director Association of Schools & Colleges of Optometry 6110 Executive Blvd., Suite 690 Rockville, MD 20852

Dear Marty:

Here, at last, is a correctly executed check for the \$25,000 grant for 1996 from the Vision Council of America to the Association of Practice Management Educators. The grant will underwrite APME for the organization's assistance in bring our practice marketing program to the schools and colleges of optometry.

To repeat what I said in my prior transmittal letter, my understanding is that ASCO will maintain the funds for APME in a restricted account and will use the grant to cover only APME costs. VICA's Board has also approved grants of \$10,000 per year for 1997 and 1998 to underwrite continuation and refinement of our practice marketing sessions, and these will be forthcoming at the appropriate times.

I hope this concludes our waltz around the dance floor to confer the grant on APME. If you need anything else, just give me a call at 703-243-1508. Thanks for your patience.

Best wishes,

Sica

William J. Wilson Director of Public Relations

Enc.: Check #4820

CC

Donald Lakin, OD Susan Burton APME CONFERENCE April 19, 1996

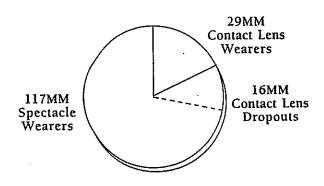
DR. HOWARD PURCELL

CONTACT LENS WARKET OVERVIEW

DATA SOURCES

- Health Products Research
- CLI

U.S. VISION CORRECTION MARKET

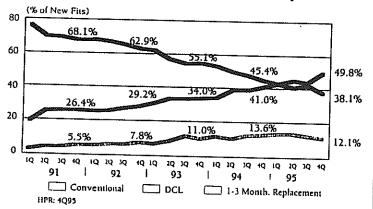


COMPETITIVE PRODUCT TOVELINE

1988	1989	1990	1991	1992	1993	1994	1995
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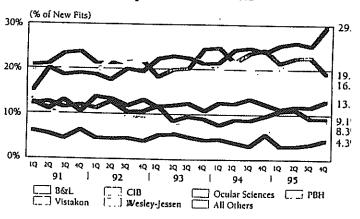
SOFT SPHERICAL NEW FITS

Conventional vs Disposable vs 1-3 Month Replacement



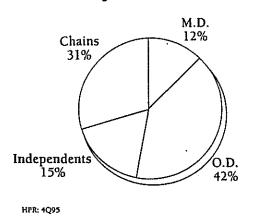
COMPANY PERFORMANCE

Soft Spherical New Fits



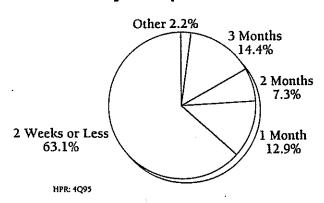
U.S. TOTAL SOFT CONTACT LENS MARKET

New Fits by Class of Trade — 1995



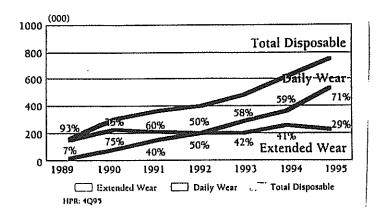
DISPOSABLE AND PLANNED REPLACEMENT NEW FITS

Daily Wear Spherical — 1995

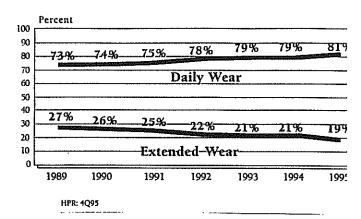


DISPOSABLE NEW FITS

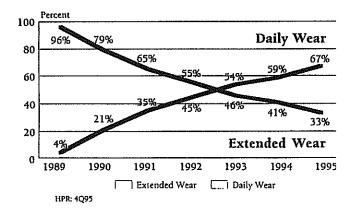
Daily Wear Vs. Extended Wear



U.S. CONTACT LENS PATIENTS 1989 — 1995

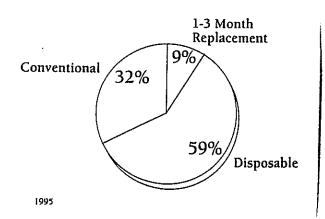


DISPOSABLE NEW FITS 1989 – 1995

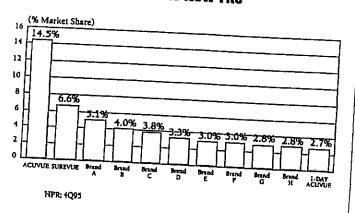


U.S. CONTACT LENS MARKET

Dollars — \$881 Million

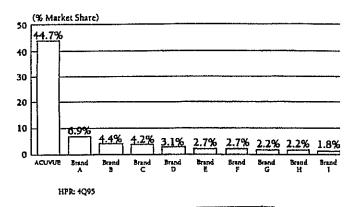


LEADING SHARES Soft Lons Now Fits

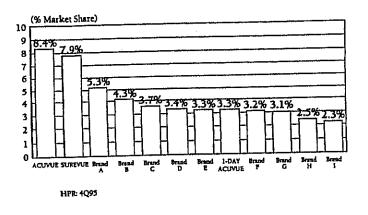


LEADING SHARES

Soft EW New Fits

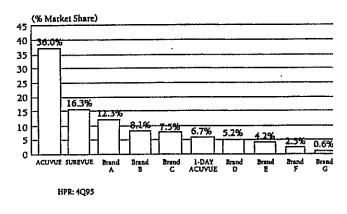


LEADING SHARES



LEADING SHARES

Disposable New Fits



OBJECTIVE

To Gain Understanding of Consumers Purchase Behavi

- Frequency of purchases
- Frequency of eye exam
- Overall satisfaction
- Switching to/from ECPs

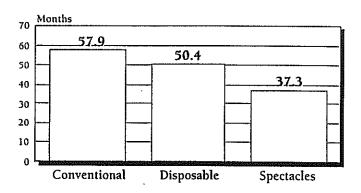
1995 — NFO Consumer Purchase Study

WETHODOLOGY

Personal Interviews

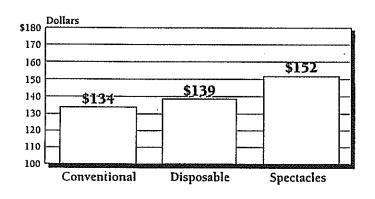
- Conventional soft wearers
- Disposable/2-week wearers
- Spectacles/never worn contacts

FREQUENCY OF PURCHASING SPECTACLE



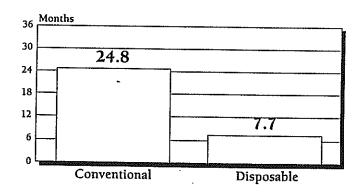
DOLLARS SPENT ON SPECTACLES

Average Amount Spent on Current Spectacles

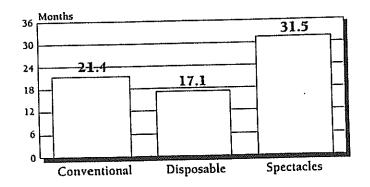


FREQUENCY OF CONTACT LENS PURCHASING

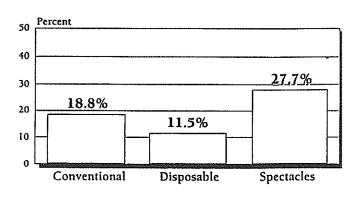
Average Months Between Purchases



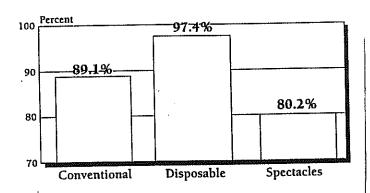
FREQUENCY OF COMPLETE EYE EXAMS



INCIDENCE OF SWITCHING LOCATIONS



OVERALL SATISFACTION WITH CURRENT PRESCRIPTION EYEWARE



5 YEAR INCOME ANALYSIS

Disposable Contact Lens vs. Conventional Contact Lens

Spectacles

5 YEAR INCOME ANALYSIS 60 Months

Spectacle Purchases

	DCL	CCL	SPEC
Average # of Months	50.4	57.9	37.3
Purchase Price	\$139	\$134	\$152
Income	\$165	\$139	\$244
Cost (40%)	\$66	\$56	\$98
Net Income	\$99	\$83	\$146

5 YEAR INCOME ANALYSIS 60 Months

	Contact Lens		
<u>-</u>	DCL	CCL	SPE
Average # of Months	7.7	24.3	N/1
Purchase Price	\$90	\$80	N/.
Income	\$701	\$194	N/
Cost	\$467	\$58	N/.
Net Income	\$234	\$136	N/

5 YEAR INCOME ANALYSIS 60 Months

Eye Exams **DCL** CCL **SPEC** Average # of Months 21.4 17.1 31.5 Cost \$60 \$60 \$60 Income \$210 \$168 \$114

5 YEAR INCOME ANALYSIS 60 Months

	DCL	CCL	SPEC
Net Income			
Spectacle Sales	\$99	\$83	\$14
Contact Lens Sales	\$234	\$136	
Exams	\$210	\$168	\$11
Total Income	\$543	\$387	\$26

5 YEAR INCOME ANALYSIS 60 Months

	DCL	CCL	SPEC
Income	\$543	\$387	\$260
Percent Switch	11.5%	18.8%	27.7%
Expected Income	\$480	\$314	\$188

SUMMARY Disposable Contact Lenses

- Greater patient satisfaction
- More profitable
- Less likely to switch

Form Name

INSTRUCTOR SELF-EVALUATION

<u>PURPOSE</u>: This instrument aims to provoke instructor reflection about assumptions and priorities that affect teaching. No set "right" answers exist nor are value judgments attached to a particular score. The goal is to encourage encounters with ideas and assumptions that inform the practice of instruction.

ADMINISTRATION: Instructors can complete this form at almost any juncture. Answers may be determined in terms of instructional activities in a given class or based on the general approach taken to teaching. The objective here is self-evaluation. The results need not be shared. For that reason, honesty is encouraged and really without risk.

INTERPRETATION: The last page of the instrument contains scoring instructions which ought to be consulted when the instrument has been completed. These interpretive suggestions should also be read then as well. Do not read further if you intend to use the instrument.

Scored results on this instrument identify areas of priority ascribed to one's teaching. Results should stimulate reflection and introspection. Are they what you anticipated or were you surprised by the results? Given a predilection towards a particular area, consider the instructional strategies and activities commonly included in your course. Do they communicate and reinforce this priority? What about the area on this instrument that represents the lowest priority? Should that area assume a greater importance? Are there instructional alterations that might increase your effectiveness in the area? Can they be implemented efficiently and without compromising your focus in other areas?

Burnout is a real, though often avoided, issue in academia. This instrument neither diagnoses its presence or contains a solution. Would that the complicated dilemmas posed by psychological stress and fatigue could be identified and eradicated so easily. However, the instrument may serve as an early warning system or perhaps detect signs that burnout may be present. The place to look for this signal is not so much in the final scores but in the feelings experienced while filling out the form. If it was uniformly difficult to distinguish between items in a set, if the process of doing so sparked feelings of frustration, possibly followed by feelings of anger and ending with a general sense of not caring, the response may be indicative of burnout. Conclusions drawn must be tentative, but the ongoing stress associated with teaching course after course, year after year, ought not to be overlooked or ignored. If nothing more, perhaps this form will encourage the recognition of the complexity associated with the act of teaching.

SOURCE: This instrument was developed by the Measurement and Research Division of the Office of Instructional Resources at the University of Illinois Urbana. It may be used in whole or part if credit is given to this source. Directions and scoring instructions have been revised by the authors of this volume. Interpretative suggestions were also added by these authors.

SCORING THE INSTRUCTOR SELF-EVALUATION FORM

The form has four scales. One statement from each set is associated with each scale.

Adequacy of Classroom Procedures.

Enthusiasm for Teaching and Knowledge of Subject Matter.

Stimulation of Cognitive and Affective Gains in Students.

Relations with Students.

STEP 1 - Record the score assigned each individual item in each of the four areas.

STEP 2 - Total each scale's scores.

<u>Adequa</u>	cy Scale Score	<u>Enthusi</u>	asm Scale Score
Set 1-a 2-c 3-a 4-b 5-a 6-a 7-d 8-d 9-a 10-b 11-b		Set 1-d 2-d 3-d 4-a 5-b 6-b 7-b 8-a 9-b 10-a 11-c	
	TOTAL		TOTAL
Stimula	tion Scale Score	<u>Relatio</u>	ns Scale Score
Set 1-c 2-a 3-b 4-d 5-c 6-d 7-a 8-c 9-d 10-d 11-d		Set 1-b 2-b 3-c 4-c 5-d 6-c 7-c 8-b 9-c 10-c 11-a	
虹	TOTAL		TOTAL

STEP 3 - To interpret the results, consider the lowest total score to represent the area in this course or in your teaching generally to which you ascribe the highest priority. The cover sheet on the instrument contains some pointers on interpreting the results.

Assoc of Practice Management Educators Annual Meeting 1996 Carole R. Burns, O.D., F.C.O.V.D.

Teaching Assessments, Variability and Reliability

I. Basic Reasons for Assessments

A. Formative Evaluations:

- 1. For self improvement (to provide information for self reflection about which areas of teaching need improvement)
- 2. Absolute data is most helpful here, judgements that are better able to tell us what we want to know, namely how effective a teacher is, not how effective s/he is relative to someone else in the same group.

B. Summative Evaluations:

- 1. For tenure and promotion or other personnel decision making purposes (to present hard evidence and specific data about teaching effectiveness for those judging teaching performance).
- 2. Comparative data is usually required by promotion committees. Comparative judgements rate how effective s/he is relative to someone else in the same group. Comparative judgements could penalize a group of teachers if all of them have achieved excellence.

II. Instruments for collecting data

- A. Questionnaires / Surveys / Interviews
- B. Checklists
- C. Classroom Observations
- D. Videotapes
- E. Narrative Reports
- F. Journals / logs of teaching events

III. Sources of Feedback on Teaching:

- A. Self
- B. Students
- C. Colleagues and Administrators
- D. Professional instructional consultants

IV. Reliability and Validity

A. Information received from Department of Psychiatry, University of Toronto.

B. Reliability

- Consistency: The tendency of different respondents to agree with one another on the ratings they assign to a teacher. Consistency varies with the number of raters, a minimum of ten raters are required.
- 2. Stability: The extent to which several ratings, made by the same rater over time, agree.
- 3. Gerneralizability: is the extent to which the ratings reflect the teacher's effectiveness in general, not just a single episode or course of teaching.

C. Validity

- As it applies to ratings from learners, is the extent to which the ratings measure what is supposed to measure, namely excellence in teaching. Maximizing validity means reducing sources of bias.
- 2. Variables which are not sources of bias: instructor age, teaching experience, personality, research productivity, student's age, student's sex, student's level or grade, student's point ave, student's personality, course size, time of day and time during the term.
- 3. Variables that are sources of bias:
 - a. Students with a prior interest in the subject matter are more likely to give a higher rating to the teacher.
 - b. Level of course. Higher level courses, especially graduate level courses receive higher ratings.
 - c. Differences in fields. Academic fields such as humanities and social sciences tend to receive higher rankings than mathematics and science.
 - d. Non-anonymous ratings, signed ratings tend to be higher than anonymous ratings.
 - e. The presence of the instructor while students are filling out the ratings tends to correlate with higher ratings.
 - f. The purpose to the ratings has been found to correlate with ratings. The ratings are higher when the directions on the form let the learners know that ratings will be used by administration for personnel decisions.

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Student evaluation of effectiveness of instruction.

This questionnaire is designed to give your instructor, the curriculum committee, and the Dean information that can lead to improvement of this course. These questions are divided into three parts: the instructor, the curriculum, and the students. On pages 1 - 3, please indicate EXACTLY two items that are good and EXACTLY two items that need improvement. On page 4, please respond on a rating scale of 1 to 5.

Instructor:

Here are 10 qualities that may characterize a good teacher and a good course. Please indicate the two qualities that MOST APTLY describe the instructor and this course.

- 1. Instructor showed a good command of the subject matter.
- 2. Instructor was interested in teaching.
- 3. Instructor was interested in helping students.
- 4. Instructor was courteous to students.
- 5. Instructor encouraged independent thinking.
- 6. Instructor was well-prepared for class.
- 7. The course was well organized.
- 8. Explanations were generally clear.
- 9. Organization of the lectures was generally clear.
- 10. I learned greatly from this course.

Now, please indicate the two qualities listed above that LEAST APTLY describe the instructor and this course, that is, where improvement is most needed.

Students:

Teaching can only be as good as the students who are learning. Here are 10 qualities that may characterize student participation in the learning process. Please indicate the two qualities that MOST APTLY describe student behavior in this course.

- 1. Students attend class, arrive on time and wait until the end of the lecture to leave.
- 2. Students are alert in class.
- 3. Students are polite to the instructor.
- 4. Students are polite to one another.
- 5. Students feel free to ask appropriate questions.
- 6. Students do not talk in class.
- 7. There is no cheating at all on exams.
- 8. Students to their homework conscientiously.
- 9. Students prepare for exams conscientiously.
- 10. Students study the material as the course progresses.

Now, please indicate the two qualities that LEAST APTLY describe student behavior in this course, that is, where improvement is most needed.

Here are some additional qualities for you to evaluate on a 5-point scale; please use "3" to indicate optimum level or performance, and the ends of the scale to indicate the greatest needed change.

The lectures were at an appropriate level.

too low 1 2 3 4 5 too high

The textbook was at an appropriate level.

too low 1 2 3 4 5 too high

The workload for this course was appropriate to the number of credits.

too low 1 2 3 4 5 too high

There were enough homeworks and quizzes.

too few 1 2 3 4 5 too many

There were enough midterms.

too few 1 2 3 4 5 too many



Evaluation Form of the Department of Psychiatry, University of Toronto, @ March 8, 1995

Note to Education Office: Please forward completed forms to Dr. Sandy Fleming for use in teaching dossiers.

EVALUATION OF <u>TEACHING</u> IN CHILD AND ADOLESCENT PSYCHIATRY: SEMINAR & PATIENT INTERVIEW CLINIC

D	ATE:					
	EACHER'S NAM					
1] ob	Note: if you have hat not apply to one t	nd more than on eacher, circle th	e teacher pleas e NA choice]	se complete a f	form for each teac	her. If some items
Iλ	VSTRUCTIONS TO Please CIRCLE with the behaviou otherwise directe	the point along ir or characteris	the line that co	orresponds to	scale below. your degree of SA nt. Use the follow	TISFACTION ving scale unless
	1	2	3	4	5	
	unsatisfactory	needs improvement	okay	good	excellent	
	 Group Leadership Helps to create maintains rapp Uses communic Skills of Interaction Demonstrates a Able to identify Demonstrates a Provides a good 	an environment port. cation facilitation on with Student positive attitude your strengths in interest in your	ts conducive to skills such as ts e toward stude and weaknesse ar development	learning—ences summarizing, ents.	ourages discussion reinforcing, clarif	n, participation, ying.
3.	 Communication S Knowledge of t Clear in conveys Conveys the clin Provides sufficient 	he subject was c ing information. nical significance	clearly demons e of information	trated. on.	~	1 2 3 4 5 NA
ļ. i.	tcomes for me as to Increased my aware Increased my aware Increased my confidential of the Increased my interest m	eness of my per eness of the doo idence in perfor	sonal reaction ctor/patient rel ming an interv	lationship iew	•••••••••••••••••••••••••••••••••••••••	12345 NA 12345 NA