

Minutes of the
Fifth Annual Conference

Association of Practice Management Educators (APME)

8-9 January 1994

St. Louis Airport Marriott Hotel

Attendance:

The 1994 APME Conference was attended by the following participants:

James Albright	Ohio State University
Mary Arnett	Southern California College
Norman Bailey	Houston College
Jack Bridwell	Houston College
Cassandra Butler	University of Missouri, St. Louis
John Classé	University of Alabama
Paul Farkas	Southeastern University
James Hawley	Southern California College
Craig Hisaka	University of California at Berkeley
Mike Jones	AOA Trustee
Roger Kamen	Ferris State University
Donald Lakin	Ferris State University
John Larcabal	Southern California College
Howard McAlister	University of Missouri, St. Louis
Gary Moss	New England College
Ronald Rounds	Northeastern State University
Tom Sandler	University of Missouri, St. Louis
Peter Shaw-McMinn	Southern California College
Lawrence Thal	University of California at Berkeley
Jim Trunick	Allergan Optical
Mike Usdan	Southern College

Goals and Objectives:

The three goals adopted by APME in 1986 were: 1) the fostering and enhancement of practice management teaching, 2) the adoption of a standardized practice management curriculum to be approved by ASCO, and 3) the completion of a textbook for use in the teaching of optometric practice management. While ongoing, the first two objectives have been met and the third should be by our next meeting.

Curriculum Committee:

Dr. Usdan investigated the possibility of using PRODIGY as a means of communicating within the committee. Not enough committee members were able to use this computer service. Dr. Usdan will continue to look into the possibility in the future.

The curriculum committee agreed on a format for the Curriculum Guide/Teacher's Manual. The guide will be composed of three parts: i) An explanation of the lesson plan format, ii) the lesson plans themselves, and iii) a list of practice management curricular elements. Dr. Shaw-McMinn distributed a rough draft of the curriculum guide.

The curriculum committee agreed to adopt the curricula elements listed as a first year practice management course. The committee recommended the second year elements listed requires further study. The third and fourth year elements will be arranged to closely follow the textbook. Listing of these will be considered upon the final version of the book.

At the evening meeting Gary Moss organized presentations of teaching methods by three committee members. Don Lakin presented a lesson plan on "Goal Setting and the Process of Personal, Career and/or Practice Management". He used the format that will be followed by the Curriculum Guide. Gary Moss presented a lesson plan on "Negotiating an Employee Contract". He also presented parts of a 10 hour course he gives on public speaking. Mike Usdan delivered a presentation of a lesson plan on "Recall Systems".

Below is the mission statement adopted by the curriculum committee and action items describing the scope of committee activities. Persons assigned to the action items are in parentheses.

Mission Statement: To develop and implement instructional programs to improve the quality of practice management education at the optometry schools.

Action Items:

Guidelines for practice management curriculum at all schools. (Paul Farkas, Don Lakin)

Recommend a number of hours on practice management in schools' curriculum. (Harry Kaplan, Don Lakin)

Review the sequence and timing of curricular elements. (Harry Kaplan)

Share lesson plans and resource materials. (Gary Moss)

Recommend types of guest lectures to complement the practice management educator, i.e., insurance agent, CPA, lawyer, architect. (Harry Kaplan, Jim Albright)

Compose a list of exercises and activities that have been successful in the classroom. (Gary Moss, Paul Farkas, Mike Usdan, Don Lakin)

Distribute practice management materials provided by industry. (Jim Albright)

Present our teaching methods and best lectures to the APME. (Gary Moss, Paul Farkas, Mike Usdan)

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

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 and 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 practice management curricular tract. (Don Lakin)

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

Monitor trends within the profession which effect the practice management curriculum. (Harry Kaplan, Mike Usdan, Jim Albright)

Reconsider value of past curricular elements. (Jim Albright)

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

Identify current areas of concern such as third party billing. (Jim Albright, Don Lakin)

Complete a Teachers' Manual/Curriculum Guide to accompany the textbook. (Don Lakin, Peter Shaw-McMinn)

Paul Farkas was voted Chairman of the Curriculum Committee and Mike Usdan appointed Vice Chair.

Dr. Shaw-McMinn thanked everyone for their efforts. Dr. Lakin passed around a sign-up sheet to restructure and focus committee efforts.

The Committee presented a revised APME "Code of Ethics" and APME "Patient's Bill of Rights" for reconsideration at next year's meeting. (See Attachment A.)

Research Committee:

Due to the absence of the Committee co-chairpersons, an abbreviated report was provided. The following items were discussed but no action taken.

The Bennett Center should continue to serve as a depository for research projects related to optometric practice management which have not been published and/or indexed. To assist in this effort all schools were again requested to have the school librarian send a copy of the abstract of such papers to Debbera Peoples. Peter Shaw-McMinn will discuss with Richard Hopping the feasibility of a similar west coast depository at SCCO. To further assist, Peter and Jim Trunick agreed to help in providing available indices. (See Attachment B.)

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

Publications Committee:

Dr. Classé presented a proposal from Butterworths Publishers concerning the textbook. Butterworths offered to publish the textbook under the following terms: royalty of 12% on the first 5,000 copies sold, 15% on the next 2,500 sold, 20% thereafter, the book would be approximately 650 pages in length, and sell for approximately \$75 to \$80. The editor would be provided with a Macintosh computer, so that the final copy could be submitted on disk. The anticipated publication date would be nine months after submission of the final draft to Butterworths.

After discussion among the members, by unanimous vote the offer from Butterworths was accepted, and Dr. Classé was authorized to sign the contract on behalf of APME. A discussion was held concerning the payment of royalties to APME through the organization's ASCO account. Dr. Don Lakin was asked to determine the appropriate mechanisms for the management of these royalties.

Dr. Classé asked the members of the group to be prepared to make modifications in individual writing assignments after the text has been reviewed in the spring or early summer. He reminded the members that the review process would likely take several months to complete.

Pathways in Optometry/Pathways in Practice:

The Pathways report was given by Jim Trunick.

Allergan's Pathways in Optometry® is a one-day educational workshop designed to assist third-year optometry students in making a smooth transition into optometric practice. Curriculum includes debt management, financial planning and tips for writing an effective business plan. Program participants also receive a comprehensive reference manual that can assist them throughout their career. Pathways in Optometry is entirely underwritten by Allergan and provided at no cost to students. The program is endorsed by the American Optometric Association, the Association of Schools and Colleges of Optometry and the American Optometric Student Association. Allergan's Pathways in Optometry is designed to help students understand and evaluate their career options and practice opportunities. Pathways in Optometry is held each year at all 19 North American schools and colleges of optometry, including those in Puerto Rico and Canada.

Allergan's Pathways in Practice™ is a two-day healthcare business management program for optometrists and technicians, sponsored by Allergan and endorsed by the American Optometric Association, the Association of Schools and Colleges of Optometry and the American Optometric Student Association. Participants learn relevant marketing and management strategies vital to a successful optometry business. Discussion topics include strong patient communications, effective

external marketing and management by statistics. Issues relating to third-party care, purchasing a practice and financial objectives also are covered. Allergan's Pathways in Practice is designed to help optometrists overcome increasing competition and better manage their business in the 90's and beyond. Pathways in Practice is held at various locations throughout the U.S.

The Pathways in Optometry program costs \$12,000 per program. Its value to students is great and it was moved, seconded and unanimously passed, "to encourage cost saving restructuring, if necessary, which may include weekday presentations, in order to continue this program".

Committee Appointments:

The new Executive Board Chair, Don Lakin, has appointed or re-appointed the following for 1994:

Executive Board:

Don Lakin, Chair
Peter Shaw-McMinn, Vice-Chair
Lawrence Thal, Past Chair
Richard Hopping
Paul Farkas (Curriculum Committee Chair)
Howard McAlister (Research Committee Chair)
John Classé (Publications Committee Chair)

Curriculum Committee:

Paul Farkas, Chair
Michael Usdan, Vice-Chair
Jim Albright
Jack Bridwell
Jim Hawley
Harry Kaplan
Gary Moss
Ron Rounds
John Rumpakis

Research Committee:

Howard McAlister, Chair
Neil Gilmard
Debbera Peoples

Publications Committee:

John Classé, Chair
Craig Hisaka
Ron Rounds
Larry Thal

Liason to AOA Ethics Committee:

Norman Bailey

Curriculum Guide Project:

Peter-Shaw-McMinn

New Projects Committee:

John Larcabal
Stuart Rothman

Curriculum Update:

The report by Ron Rounds and Mike Usdan is summarized in Attachment C.

National Health Care Policy and Optometry:

Michael Jones, AOA Trustee, has been optometry's chief spokesperson in Washington the past six years and has helped author all of AOA's policy statements concerning health care reform. He provided a broad overview of healthcare reform and followed with some suggestions as to what might be taught optometry students.

The objective of health care policy reform is to decrease cost, increase accessibility and to insure no American remains uninsured. Presently health care's portion of the national budget is 14%, behind defense (21%), social security (19%) and interest (15%). Education, along with road repair, etc., makes up a portion of the rest. Crime alone (police, courts, prisons) accounts for 12% of our GNP.

Most of our uninsured are so because they are young and healthy and have elected not to have insurance or are temporarily unemployed. The truly poor are covered by Medicaid. Increased costs are to be borne by providers (reduced reimbursement), consumers (larger deductibles, fewer authorized services, and co-payments all dependent on ability to pay), taxpayers and employers. (Guess what? We are all four of these!) The government would control costs and employers would pay for health coverage for all employees (U.S. citizens or immigrant, full or part-time worker).

The implication for our graduates is that they must be well versed in:

- reimbursement methods (i.e., capitation)
- coding methods for describing what we do
- understanding various practice modes (solo, group, HMO, hospital) and the economics of each
- integration of health care politics, law and finance
- political activism
- dispensing economics
- fee review
- balanced billing
- plan administration costs
- utilization rates
- panel membership
- hospital privileges
- contract exclusivity – open vs. closed panels
- fee-for-service vs. capitation

Our schools and colleges of optometry must position themselves to obtain contracts and to protect the sources of patients needed to run a viable teaching program.

Students will need to be much more skilled in evaluating contracts and in negotiation.

Preparing our graduates for health care reform will be a challenge. An understanding of terminology and basic concepts will be crucial regardless of the direction reform takes.

Placement Services:

Mary Arnett provided much food for thought. Mary is responsible for placement and, alumni relations at SCCO. These two responsibilities are necessarily linked. Hers is a full-time position. She has one full-time staff person. Her student contacts begin in first year and is an on-going process. Students become employees who become employers. The approach at SCCO is independent private practice oriented. Mary believes the orientation of placement services must reflect the values of the institution. At SCCO there is no corporate or institutional involvement.

SCCO operates a 24-hour hotline listing optometric positions, practice and equipment sale. They conduct a "placement fair" which is alumni sponsored and is practice management oriented with guest speakers.

Upon graduation, each student is provided a class picture, alumni association membership for one year, a school history, a listing of optometrists in their home town or state and a listing of alumni in state leadership position.

Recommendations made were:

1. Each school should maintain an active placement service and one consolidated computerized service should exist on each coast.
2. Basic philosophy needs to be addressed regarding how these services are paid for, whether services are merely listing services or are matching services, etc.
3. To be maximally effective schools must be willing to share resources.
4. APME should encourage all schools to provide meaningful placement services.

Next Meeting:

It is hoped that APME will continue to receive the generous sponsorship of Allergan Optical to enable APME to hold its Sixth Annual Conference next year. The Executive Board will advise all participants, as soon as possible, the next location and applicable dates. (January 7-8 in Memphis is being considered along with AOSA.)

Acknowledgment:

We wish to convey our thanks and appreciation to the Association of Schools and Colleges of Optometry (ASCO) for supporting the 1994 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: Proposed APME Code of Ethics and Patient's Bill of Rights
- Attachment B: Research Indices
- Attachment C: Curriculum Statistics
- Attachment D: Material provided by Mike Jones
- Attachment E: Material provided by Mary Arnett
- Attachment F: Press release and correspondence
- Attachment G: APME telephone and address listing

ASSOCIATION OF PRACTICE MANAGEMENT EDUCATORS (APME)

Fifth Annual Conference
8-9 January 1994
St. Louis Airport Marriott Hotel

- AGENDA -

Friday, 7 January -arrival and hotel check-in (check with your committee chair as to whether a committee meeting will be held Friday evening)

Saturday, 8 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/Larry Thal
-Curriculum Committee - Peter Shaw-McMinn
-Research Committee - Jim Marbourg / Debbera Peoples
-Publications Committee - John Classe'

10:00 - 10:15 a.m. -Break

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

11:00 a.m. -Placement services - Presentation by Pennsylvania College of Optometry and Southern California College of Optometry

12:15 - 1:30 p.m. -Lunch

1:30 - 2:00 p.m. -"Pathways in Optometry" and "Pathways in Practice" update - James Trunick

2:00 - 2:30 p.m. -Surveys Utilizing a National Data Base - Larry Thal

2:30 - 3:00 p.m. -Efforts to Reform Ethics Curriculum - John Classe'

- 3:00 - 4:30 p.m. -Practice Management Textbook - John Classe'
- 5:00 - 6:00 p.m. -Reception
- 6:00 - 9:00 p.m. -Dinner meeting
-Election of Officers
-Discuss date and place of next APME meeting
-Ideas for improving teaching effectiveness - Gary Moss

Sunday, 9 January

- 8:00 a.m. -coffee and sweet rolls
- 8:30 a.m. -Practice management research index - Debbera Peoples
- 8:45 a.m. -National Health Care Policy and Optometry - Michael Jones
- 10:00 - 10:15 a.m. -Break
- 10:15 - 10:45 a.m. -National Health Care Policy and Optometry - cont'd
- 10:45 - 12:15 p.m. -Committee work sessions
- 12:15 - 1:30 p.m. -Working lunch by committee (hotel check-out)
- 1:30 p.m. - Presentation of committee recommendations and final report
 - a) Action on prior recommendations
 - b) New recommendations
 - c) Committee charges
 - d) Committee assignments
 - e) Other administrative announcements
- 3:30 p.m. -Departure (Please try not to schedule departing flights until at least 4:15 p.m.)

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MEMORANDUM

To: Curriculum Committee
From: Peter G. Shaw-McMinn, O.D.
Subj: APME Curriculum Committee Report
Date: January 25, 1994

Because of the inability for several schools to attend the meeting and the tardiness of the chairman, many of the projects the curriculum committee was working on were not reported. Below is a summary of what was reported.

Dr. Usdan investigated the possibility of using PRODIGY as a means of communicating within the committee. Not enough committee members were able to use this computer service. Dr. Usdan will continue to look into the possibility in the future.

The curriculum committee agreed on a format for the Curriculum Guide/Teacher's Manual. The guide will be composed of three parts. i) An explanation of the lesson plan format ii) the lesson plans themselves iii) A list of Practice management curricular elements. Dr. Shaw-McMinn distributed a rough draft of the curriculum guide.

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Below is the mission statement adopted by the curriculum committee and action items describing the scope of committee activities. Persons assigned to the action items are in parentheses.

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. (Paul Farkas, Don Lakin)

Recommend a number of hours offered on PM in schools' curriculum. (Harry Kaplan, Don Lakin).

Review the sequence and timing of curricular elements. (Harry Kaplan)

Share lesson plans and resource materials. (Gary Moss)

Recommend types of guest lectures to complement the PM educator. Ex. Insurance Agent, CPA, lawyer, architect. (Harry Kaplan, Jim Albright).

Compose a list of exercises and activities that have been successful in the classroom. Gary Moss, Paul Farkas, Mike Usdan, Don Lakin)

*Jack
Birdwell*

* Distribute PM materials provided by industry. (Jim Albright)

Present our teaching methods and best lectures to the APME. (Gary Moss, Paul Farkas, Mike Usdan)

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

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.

*Carol
Bass*

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

Recommend prerequisites to gain admittance into the PM curricular tract. (Don Lakin)

* Share testing instruments to measure validity/reliability in evaluating whether we are effectively teaching. (Jim Albright)

* Monitor trends within the profession which effect the PM curriculum. (Harry Kaplan, Mike Usdan, Jim Albright) *Must work*

Reconsider value of past curricular elements. (Jim Albright)

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. (Mike Usdan)

Identify current areas of concern such as third party billing. (Jim Albright, Don Lakin)

Complete a Teachers Manual/Curriculum Guide to accompany the textbook. (Don Lakin, Peter Shaw-McMinn)

I'm sorry we were not able to cover many of these items you were interested in. I've forwarded your interests to our new chair, Paul Farkas. He will be assisted by co-chair Mike Usdan.

In closing I'd like to thank you for your interest and participation on committee business. I know your time is limited, and communication between us is very difficult. I've learned a lot from exchanging ideas with you. It's comforting to know there are others in this world with the same problems I have, (mainly teaching PM). Don't be surprised to get a call from me for help on completing the Curriculum Guide/teacher's manual. Take care and I hope to see you next year.

Pete