



## **Executive Director Annual Report Harriet O'Connor, CFRE, CAE April 2008-March 2009**

Thank you for the opportunity and privilege of serving the American Academy of Osteopathy as your Executive Director. I want to express my gratitude for your help and understanding during this first ten months with the Academy. My special thanks to Dr. DeFeo and Dr. Pasquarello for their guidance and support ; to AAO board members and committee chairs for their advice and counsel, to the staff of the AOA for their assistance and counsel; and to the AAO staff for their support and assistance.

Beginning on May 19, 2008, I began my journey working on your behalf with the staff and volunteer leadership to assist the AAO in achieving its mission. Prior to assuming the position I had the opportunity to observe your Convocation and its related meetings and activities, the January Education Committee meeting, and a few AAO staff meetings. The past ten months have been a learning experience for me as I worked to assure that the daily activities of the Academy continued while developing an in-depth understanding of the AAO and its unique culture and the AAO's role in the field of Osteopathy, healthcare in general, and in society. The job has been a whirlwind of experiences including participation in the AOA House of Delegates and Board Meetings; AAO's educational workshops; the Convention; AOA cluster meetings; the AOA CME Conference; and now the Convocation and its preparations.

In addition overseeing the daily operations and assuring that the activities provided by the organization remain constant; my first charge from the AAO Board of Trustees was to prepare a business plan for the Academy to be reviewed at the June 2008 board meeting. The first steps in the preparation of this plan was to conduct an organizational audit of the AAO to develop a more in-depth understanding of the organization and conduct individual staff interviews as well as a staff retreat to provide insight into the organization's operations. Utilizing the Strategic Plan as a road map, the first draft of the business plan was drafted and presented to the Board of Trustees at their June 2008 meeting. The plan was further expanded for the October 2008 Board of Trustees meeting and will be further refined for the June 2009 Board of Trustees meeting.

Since the 2008 annual meeting, AAO experienced the retirement of its beloved longtime Executive Director Steven Noone. In June Maria Canallas, Membership Coordinator/AOBNNM Credentialing Coordinator, resigned. Jennifer Taylor joined the AAO staff in August to work with public relations including the AAO publications and website. There have also been changes in the roles of staff with Ms. Bowersox assuming the role of Membership Director in addition to her work with Fundraising and Marketing. The CME Education activities have been consolidated under Ms. Finley as well as the AOBNNM Credential Coordination. Ms. Taylor has recently assumed the responsibilities for the working with postgraduate activities and Deborah Johnson has assumed responsibility for the coordination of Fellowship activities.

2008 and 2009 continue to present unique challenges for the Academy. The United States economic crisis; potential changes in the United States healthcare system; the growing shortage of physicians; osteopathic students selecting allopathic residency programs; and the development of educational programs and certifications/credentials in osteopathic techniques for other healthcare professionals are some of the issues facing the Academy and the profession. One of the major challenges facing the Academy is working to assure the financial viability for Osteopathic Physicians utilizing OMM in their practice.

As the Academy approaches its 75<sup>th</sup> anniversary of work on behalf of osteopathic professional we are working to assure that AAO has the capacity to address the needs of its members for the next 75 years. To assure that the Academy can be of the most assistance to our members, the Academy's first steps concentrate on capacity building for the organization. The AAO Board in June of 2008 dedicated \$50,000 of the 2008 funds to technology needs for the organization including updating the organization's computer equipment and software, creating a computer network, and working to upgrade the website. The update of technology throughout the AAO headquarters will

streamline efficiency in respond to member needs as well as add the convenience of members registering for AAO courses and Convocation online and receiving instantaneous confirmations.

The primary focus of the AAO remains Education and the AAO Education Committee under the leadership of Dr. Jane Carreiro had a successful year in 2007-2008. The 2008 Convocation program entitled “Unlocking the Secrets of the Thoracic Cage: “Applying functional anatomy and physiology to clinical practice” was chaired by John G. Hohner, DO, FAAO, and exceeded expectations with 415 physicians, 483 students, and 44 exhibitors in attendance. The 2008 AAO program “Fit and Healthy: An Osteopathic Approach to Fitness and Obesity” was chaired by Natalie Nevins, DO at the AOA Convention was also successful. The CME workshop presented in the last twelve months included:

- March 30-April 1, 2008: Approaches in Pulmonology: the Lungs and Airways; Kenneth Lossing DO, Program Chair and Faculty; Table Trainers: Margaret Klein, Daniel Bensky, DO, and Terri Turner, DO.
- May 16-18: The Twig Unbent: An osteopathic Approach to Common Orothopedic Problems in Children, Jane Carreiro, DO, Program Chair and Faculty; Table Trainers: Stephanie Waecker, DO, Heather P. Ferrill, DO, Lynette Bassett Willard, DO, and William Foley, DO.
- July 11-13, 2008: Masters Course: *Comparing Facilitated Positional Release, Counterstrain and Still Technique*, Ann L Habenicht, DO, FAAO and John G. Hohner, DO, FAAO, Co-Chairs and Faculty; Faculty: Stanley Schiowitz, DO, FAAO and Richard L. Van Buskirk, DO, FAAO.
- October 9-11: *Prolotherapy Weekend for all Levels and Experience*, Mark S. Cantieri, DO, FAAO Program Chair and Faculty; George J. Pasquarello, DO, FAAO Faculty.
- October 25, 2008: *Avoiding Disaster—Osteopathic Approach to the Flue Pandemic*, Dennis J. Dowling, DO, FAAO, Program Chair and serving as a member of its faculty as well as David Condoluci, DO, FACOI, and Humayun Chaudhry, DO, FACP, FACOI, FAODME.
- November 7-9, 2008: Masters Course: *Muscle Energy with* Stephanie Waecker, DO as Program Chair and Faculty included: Edward G. Stiles, DO, FAAO, Phillip E. Greenman, DO, FAAO; and Carl W. Steele, DO.
- December 5-7: *An Osteopathic Approach to Treat Cranial Nerve Dysfunction: ala Barral*, Kenneth J. Lossing, DO, Program Chair and Faculty. Margaret Klein, Table Trainer.
- February 28-March 1: *Dr. Fulford’s Basic Percussion: A Systemic Approach to the Whole Body*, Rajiv Yadava, DO, Program Chair and Faculty; Table Trainers: Paula L. Eschtruth, DO and Theresa A. Cisler, DO.
- March 25, 2009: *Progressive Inhibition of Neuromusculoskeletal Structures (PINS)*; Dennis J. Dowling, DO, FAAO Program Chair and Faculty.

Although all the workshop programs received favorable evaluation by their attendees, the attendance of the programs were below projections and two January 2009 programs were cancelled. The Committee in January 2009 developed their 2009 program calendar which is awaiting approval by the Board of Trustees at their June 2009 meeting.

Membership which is the lifeblood of the organization. For the 2008-2009 membership campaign as of February 20, 2009 data show the following number of members in the categories listed below:

1st Yr in Practice = 90	Associate - Int'l = 21
2nd Yr in Practice = 40	Associate - Joint = 2
Active - Full = 883	Exempt = 6
Active - Full Waived = 2	Int'l Affiliate = 52
Active - HLM = 22	Intern = 24
Active - Joint = 13	Resident - Full = 154
Active - Joint/3 = 2	Retired - Full = 84
Active - LM = 44	Retired - HLM = 14
Active - Reduced = 1	Retired - LM = 4
Associate - Full = 39	Supporter = 23
Associate - Honorary = 6	<b>TOTAL 1526</b>

The membership committee under the leadership of Sharon Gustowski has also begun to look at the benefits package for members including increased communication, directory category changes as well as categories of information in the Find a Physician section on the website.

Residency Programs have a focus of the AOA and all Specialty Colleges this year. The Postgraduate Standards and Evaluation Committee under the leadership of Dr. Doris Newman has oversight of residency training in neuromusculoskeletal medicine and osteopathic manipulative medicine (NMM/OMM). These programs include three models of residency training: two-year NMM/OMM programs, Plus-One programs and Integrated Family Practice/NMM programs. The committee created basic standard documents that will be in line with the AOA's new uniform standards policy. The PSE is working with the AOCI developing a new basic standards document for a new IM/NMM Integrated Residency Training Program. The PSE is working on an innovative and new Alternative Residency Training program designed to target the practicing Osteopathic physician wishing to become AOBNMM eligible while maintaining part-time medical practice. The basic standards document for this program is in its second version and will be considered by the PSE at the March 2009 meeting in Arkansas. The committee this year completed inspections of three residency programs and made recommendation for continuing approval to AOA's Program and Trainee Review committee (PTRC). Inspectors have scheduled visits to ten programs in 2009. The committee approved two new residency programs bringing the number of residencies to date is 31. The committee also collaborated with the American College of Osteopathic Family Physicians to complete revisions to the basic standards for residency training in Integrated Osteopathic FP/NMM/OMM. PS&E consistently works with residency programs and OPTI's to develop curricula regarding techniques for interns/residents to integrate OMM and OMT into their daily care of patients. Topics include the management and inspection of NMM residency programming. PSE is working closely with a potential new program director in Chicago and aiding her in obtaining hospital credentialing processes in order to establish a new Plus-One residency training program within that institution. The PS&E committee is working towards core competency education and lifelong learning within the annual program director's workshop. This two-hour mandatory workshop for all residency program directors include topics such as Research 101; Barriers to NMM hospital credentialing; OMT Billing/coding mistakes often made by postgraduate trainees. This year's volunteer presenters are Drs. Rowane, Carnes and Jorgensen.

The AAO Board of Trustees at the June 2008 meeting continued to move the organization to the expansion of its electronic communications. *The Noone News* became the *Leadership Newsletter* upon the retirement of Mr. Noone and is published monthly electronically. The *AAO Membership Newsletter* is also published monthly electronically. Dr. Robert Clark resigned as *AAOJ* Editor in late 2008 and Dr. Ray Hruby serves as the interim editor for the publication. Ms. Taylor is currently working on a media guide for the use of members who receive requests by the media. It will serve as guide equipped with information and tips to ensure that the important message about osteopathy and OMM are being shared with the media. We are continuing to work to expand the AAO's communication tools in order to be a valuable resource to members, other specialty colleges, and the public consumers.

The Louisa Burns Osteopathic Research committee (LBORC) is continuing to serve under the c-chairmanship of Drs. Seffinger and Smutny. The committee approved the applications of two new research projects; "OMT and the Effects on Cervical Kinematics" and "OMT and Force Sensing Gloves" conducted by Michigan State University. The LBORC continues the daunting task of developing a uniquely osteopathic electronic medical record, the eSOAP. The eSOAP project and the National Osteopathic Database Project is currently partway through a field test. The LBORC has increased the participation, visibility, and promotion of quality Neuromusculoskeletal Medicine/Osteopathic Manipulative Medicine (NMM/OMM) research and research training by encouraging and recommending funding for research in NMM/OMM from various osteopathic institutions, mentoring students at osteopathic colleges in NMM/OMM research, publishing abstracts and articles on NMM/OMM research in the Journal of the American Osteopathic Association (JAOA) and other peer reviewed journals, presenting posters at the American Osteopathic Association (AOA) research conference in October 2008 in Las Vegas, and developing NMM/OMM research training seminars for osteopathic students and residents. The LBORC has continually working to identify existing and new funding resources for NMM/OMM research. The LBORC in conjunction with the Osteopathic Research Center (ORC) is offering NMM/OMM research training opportunities annually. The LBORC members promote and create opportunities for OMM research and mentorship of students and residents within osteopathic medical schools and Osteopathic Postdoctoral Training Institutes (OPTIs). The LBORC promotes the availability of OSTMED.DR osteopathic research database, which is easily accessible to AAO members. The AAO Journal is currently in the process of being added to the OSTMED. DR database. The LBORC will be developing its next 3 year strategic plan; continue to be involved with developing the eSOAP electronic medical record (EMR); continue to develop the national osteopathic database center; improve the application process for research grants from the AAO; improve the research portion of the AAO web site; encourage and facilitate NMM/OMM research amongst osteopathic pediatricians; collaborate with researchers at various institutions, e.g., the AOA, ORC, colleges of osteopathic medicine and NIH, to develop NMM/OMM research studies, NMM/OMM clinical guidelines and NMM/OMM outcome studies.

In the advocacy arena the AAO has created a Special Taskforce to develop position papers and guidelines for use with insurers and hospitals. The Academy is also working to update its AAO Bureau of Experts and its Speaker's Bureau. Members of the Academy

continue to serve at the state and national level on policy making/advisory committee related to quality health and to assure understanding of osteopathy and the need for adequate reimbursement of osteopathy.

The Academy also continues to work on OMM Faculty Development through its special taskforce under the leadership of Dr. Michael Rowane. The taskforce has developed a proposal to create an OMM Faculty Development Institute.

Collaboration continues to be a goal of the Academy. The Academy encourages its members to be involved in the AOA. The organization also continues to work with other organizations as exemplified by our collaborative programs at the AOA Convention and is working to expand our collaborative activities in the future.

AAO is a 501(c)(3) organization and with new IRS requirements for nonprofit organization, the Academy has been working to assure that it is total compliance with these requirements. AAO has been reviewing its financial policies and operation as part of its capacity building in our stewards of the resources.