

Name (report preparer): Lauren Carr

Date: 2/8/2021

Name of Council/Committee/Task Force:

Council on New and Younger Members

MEETINGS

Date: 2/6/2021

Conference Call In-person

Location: Online

Attendance:

Chair: Dr. David White

Members: Drs. Mary Lanier Berne, Adam Donnell, Mary Hoffman, Daniel Keith, Brandon Shoukri, Lauren Wiese, Todd Wright, James Gordon, Steven Siegel (BOT Liaison)

Staff: Brandon Hackworth, Lauren Carr

Not Present: Dr. Lisa Kwarteng

Guest(s): [Click here to enter text.](#)

DISCUSSION

Topic	Discussion	Action/Follow-up
Meeting	The annual meeting of the Council on New and Younger Members (CONYM) was held on Saturday, February 6, 2021 via conference call.	N/A
Agenda Approval	The meeting agenda was approved as submitted.	N/A
Minutes Approval	The minutes from CONYM's 2020 meeting were approved by consent.	N/A
Board Liaison Report	<p>Dr. Steven Siegel, Board Liaison to CONYM, provided an overview of AAO governance (as it relates to the council) as well as recent AAO activities, which included the following discussion points:</p> <ul style="list-style-type: none">• A private practice accelerator program will be developed, in conjunction with the Wharton Business School, to provide training, motivation, and support to help participants increase practice profitability• An Inclusion and Engagement task force will be formed to inspire diverse groups within the AAO by developing pathways to leadership and identifying unique needs and issues• The BOT will hold off on selecting a third At-Large Trustee for the 21-22 fiscal year to review the strategic plan, conduct a futurist study, and gather feedback from the Inclusion and Engagement Task Force to identify attributes needed for the next At-Large Trustee• An Orthodontic Service Organization (OSO)/Dental Service Organization (DSO) Task Force will be established to inform AAO on matters important to OSO/DSO ownership and help shape solutions the AAO can provide to address them• Member Facebook groups will be formed, starting with the Committee on Technology, to provide avenues for creating connections and facilitating the communication of ideas across AAO member peer groups	N/A

	<ul style="list-style-type: none"> • The annual House of Delegates meeting will be held online during the third week of April • The Winter Conference will be held online from February 12-14, 2021, focusing on clear aligner treatment • Annual Session will be held in-person in Boston and online from June 25-27, 2021 																																																			
<p>NYM Trends & Market Share Report</p>	<p>Brandon Hackworth, Membership Director and CONYM staff liaison, presented the AAO’s membership trends for new and younger members (NYMs) as well as U.S. market share data with breakouts by demographics and constituents.</p> <p>Brandon also announced the newly designed AAO member website, including persona pages, which can be found here: https://www2.aaoinfo.org/</p> <p>Brandon also shared the following results for CONYM’s outreach to new and younger members who hadn’t renewed their AAO memberships by November.</p> <table border="1" data-bbox="375 863 1295 1205"> <thead> <tr> <th>CONYM Rep</th> <th>Constituent</th> <th># Started With (10/20/20)</th> <th># Members Renewed (1/6/21)</th> <th>% Renewed (by 1/6/21)</th> </tr> </thead> <tbody> <tr> <td>Berne</td> <td>SAO</td> <td>160</td> <td>102</td> <td>63.8%</td> </tr> <tr> <td>Donnell</td> <td>NESO</td> <td>105</td> <td>79</td> <td>75.2%</td> </tr> <tr> <td>Hoffman</td> <td>PCSO</td> <td>162</td> <td>122</td> <td>75.3%</td> </tr> <tr> <td>Keith</td> <td>MSO</td> <td>60</td> <td>40</td> <td>66.7%</td> </tr> <tr> <td>Shoukri</td> <td>GLAO</td> <td>66</td> <td>44</td> <td>66.7%</td> </tr> <tr> <td>White</td> <td>SWSO</td> <td>79</td> <td>57</td> <td>72.2%</td> </tr> <tr> <td>Wiese</td> <td>MASO</td> <td>68</td> <td>47</td> <td>69.1%</td> </tr> <tr> <td>Wright</td> <td>RMSO</td> <td>33</td> <td>23</td> <td>69.7%</td> </tr> <tr> <td></td> <td>Totals</td> <td>733</td> <td>514</td> <td>70.1%</td> </tr> </tbody> </table>	CONYM Rep	Constituent	# Started With (10/20/20)	# Members Renewed (1/6/21)	% Renewed (by 1/6/21)	Berne	SAO	160	102	63.8%	Donnell	NESO	105	79	75.2%	Hoffman	PCSO	162	122	75.3%	Keith	MSO	60	40	66.7%	Shoukri	GLAO	66	44	66.7%	White	SWSO	79	57	72.2%	Wiese	MASO	68	47	69.1%	Wright	RMSO	33	23	69.7%		Totals	733	514	70.1%	<p>CONYM to continue non-renewal outreach efforts annually.</p>
CONYM Rep	Constituent	# Started With (10/20/20)	# Members Renewed (1/6/21)	% Renewed (by 1/6/21)																																																
Berne	SAO	160	102	63.8%																																																
Donnell	NESO	105	79	75.2%																																																
Hoffman	PCSO	162	122	75.3%																																																
Keith	MSO	60	40	66.7%																																																
Shoukri	GLAO	66	44	66.7%																																																
White	SWSO	79	57	72.2%																																																
Wiese	MASO	68	47	69.1%																																																
Wright	RMSO	33	23	69.7%																																																
	Totals	733	514	70.1%																																																
<p>Membership Resolutions Impacting NYMs</p>	<p>CONYM member Dr. Daniel Keith provided an overview of membership resolutions from Council on Membership, Ethics & Judicial Concerns (COMEJC) that will impact NYMs:</p> <ol style="list-style-type: none"> 1. Shorten the membership renewal deadline from December 31st to October 31st 2. Offer the 3% ACH discount permanently 3. Implement a graduated dues scale for new International Members (to mirror the one offered for domestic members) 	<p>N/A</p>																																																		
<p>“Four Areas of Focus” Initiatives</p>	<p>CONYM members provided an update on initiatives related to the “four areas of focus” identified by the Board of Trustees: clear aligners, financial management, practice management, and all things digital. CONYM is primarily focusing on the areas of practice and financial management for new and younger members.</p> <p>Initiative #1: Practice Management – Consider a practice owner toolkit to provide comprehensive guidance for running a practice as either a solo practitioner or partner in a group.</p> <p>Update: Dr. David White, CONYM Chair and NYM advisor to COOP, shared his involvement on a joint COOP/CONYM subcommittee to</p>	<p>Subcommittees to continue working on initiatives.</p>																																																		

	<p>develop an online lecture series for orthodontic office design and business planning. Additional content relative to new practice owners will also be considered.</p> <p>Initiative #2: Practice Management – Develop resources for women preparing for and transitioning back from maternity leave (possibly in collaboration with COOP and Special Committee on Women Orthodontists).</p> <p>Update: CONYM members Drs. Mary Lanier Berne and Mary Hoffman will be collaborating on a subcommittee with Drs. Valerie Martone and Marie Lathrop from the Special Committee on Women Orthodontists to identify content needs.</p> <p>Initiative #3: Financial Management – Focus CONYM presentation at GORP around financial management, possibly as a synopsis of the Financial Management for Residents program.</p> <p>Update: Drs. David White and Mary Hoffman are identifying and preparing content inspired by the book, <i>The White Coat Investor: A Doctor's Guide to Personal Finance and Investing</i>. The presentation will focus on tips around student loan refinancing, initial investment decisions, and saving goals.</p> <p>Other initiatives: Practice and financial management content will also be incorporated into the New Orthodontist and Resident Conference. An update is provided below.</p>	
<p>AAO Mentoring Program</p>	<p>AAO staff member Lauren Carr discussed a strategy for the AAO Mentoring Program moving forward, including a new platform (InstaViser) and ideas for grassroots promotion and recruitment.</p> <p>The new platform will feature a more short-term and streamlined approach, allowing mentees to book individual sessions with mentors on a given topic and meet through the platform via one-on-one video or phone conversations.</p> <p>The council will assist in developing conversation topics for participants to choose from and consider a new name for the program, including the elimination of “mentor” and “mentee” labels. Ideas include “AAO Advisor Network” or “AAO Support Network”. The emphasis will be on peer-to-peer mentoring and information sharing.</p>	<p>Staff to implement changes and report back to the council.</p>
<p>New Orthodontist & Resident Conference at AAO Annual Session</p>	<p>The 2021 New Orthodontist and Resident Conference at Annual Session is scheduled on Saturday, June 26, 10:30am-1:00pm in Boston, MA.</p> <ul style="list-style-type: none"> • The event will feature two TED-style presentations given by LeeAnn Peniche and Wesley Lyon (about 20-25 minutes long using a storytelling approach) • The overall theme is clinical and business strategies for new orthodontists with topics covering new patient consultations (LeeAnn Peniche) and managing overhead costs for practice 	<p>Staff and planning committee to identify volunteer moderators and continue marketing event.</p>

	<p>owners (Wesley Lyon)</p> <ul style="list-style-type: none"> • The event will continue with a roundtable format to encourage direct conversation with subject-matter experts, experienced orthodontists, and members of the Board of Trustees and CONYM (1-2 moderators at each table) • Presenters will stay for the roundtable portion and serve as roundtable hosts to discuss their topics with attendees who have additional questions • Simple lunch options will be provided for attendees <p>All CONYM members planning to attend the 2021 Annual Session are requested to attend and assist with this program. All CONYM members are planning to attend, except Dr. Hoffman.</p> <p>Planning committee members for the 2022 program will be determined during a future conference call.</p>	<p>Committee members to be identified and begin planning following 2021 Annual Session.</p>
<p>Annual Session Programming for NYMs</p>	<p>The council will be asked to review the 2021 Annual Session program schedule when available and provide input on which lectures are most pertinent to NYMs. These will be marked with a special NYM logo/icon in the on-site program.</p>	<p>Staff to provide program schedule once available and request feedback from the council.</p>
<p>New and Younger Member Articles</p>	<p>Lauren Carr reported on published and pending articles for new and younger members. These are distributed via general eBulletins targeted to the new and younger member segment as well as news items on the AAO member homepage.</p> <p>The 2019-20 contribution schedule is as follows:</p> <ul style="list-style-type: none"> • Summer 2019 (August): Dr. Brandon Shoukri • Fall 2019 (November): Dr. Todd Wright • Winter 2020 (February): Dr. Lauren Wiese • Spring 2020 (May): Dr. Mary Lanier Berne 	<p>Staff to send guidelines to article contributors.</p>
<p>CONYM Brainstorm</p>	<p>The council discussed potential challenges and concerns of NYMs that AAO can address:</p> <ul style="list-style-type: none"> • Increasing class size at Georgia School of Orthodontics – the AAO has representation on CODA to provide input on accreditation standards and ensure they are being met, including a robust visitation process • Some DSOs may be offering less compensation and benefits than previous years – The AAO can potentially offer: <ul style="list-style-type: none"> ○ Advice from an attorney on negotiation strategies ○ Detailed compensation data by area/role/modality ○ An overview of the differences between contract and employee status 	<p>CONYM to consider possible article contributions.</p> <p>Staff to explore the possibility of publishing salary and income data collected through the Economics of Orthodontics survey</p>

Representation on Councils & Committees	The following NYM council advisor appointments were identified for 2021-22: COE – Dr. Lauren Wiese COGA – Dr. Mary Hoffman COMEJC – Dr. Mary Lanier Berne COOP – Dr. David White CTECH – Dr. Brandon Shoukri Appointments still need to be identified for COC and COHC.	Staff to reach out to incoming council members regarding open appointments.
GORP (Graduate Orthodontic Residents Program)	Dr. Mary Hoffman will tentatively represent CONYM at the 2021 GORP meeting in St. Louis, MO (July 29-August 1).	CONYM representative to participate as planned.
American Student Dental Association (ASDA) Annual Session	The 2021 ASDA Annual Session is cancelled due to the COVID-19 pandemic. A volunteer will need to be identified for the 2022 ASDA Annual Session, though the date and location has not been confirmed. Staff will send information to CONYM once available.	Staff to update CONYM on date/location of ASDA Annual Session and confirm CONYM representative or Resident Champion.
ADEA (American Dental Education Association) Virtual Fair	Volunteers will not be needed for the ADEA virtual fair this year, which will focus on international dental graduates interested in advanced standing programs in the United States. Volunteers may be needed in 2022 once more information is available.	Staff to update CONYM on date, time, and focus of future ADEA virtual fairs.
Council Chair Election	The following individuals were nominated for council chair for 2021-22: <ul style="list-style-type: none"> • Dr. Brandon Shoukri (GLAO) • Dr. Lauren Wiese (MASO) 	TBA
Next Meeting	The next meeting will take place at the 2022 Winter conference in Orlando, Florida. The meeting is scheduled for Thursday, January 27, 2022.	N/A
Adjournment	Having no other business, the meeting adjourned at 11:50am.	N/A

Annual Budget (Feb.)	
Previously approved via email ballot on January 20, 2021, the 2020-21 CONYM budget as proposed:	
Council Meeting	\$20,935
Annual Session Stipend – Chair	300
Annual Session Stipend – Residents	1,000

GORP Travel (1 representative)	1,300
Mentoring Program Software	15,000
	TOTAL <u>\$38,535</u>

Nomination of Council Chair (Annually, Nov. or Feb)	Name	Constituent
February	Dr. Brandon Shoukri	GLAO
February	Dr. Lauren Wiese	MASO

Future Reference or Archive

The council would like to retain these items for future reference or for archive:

N/A