

Name (*report preparer*): Lauren Carr

Date: 2/16/2022

Name of Council/Committee/Task Force:

Council on New and Younger Members

MEETINGS

Date: 1/27/2022

Conference Call In-person

Location: Orlando, Florida

Attendance:

Chair: Dr. Brandon Shoukri

Members: Drs. Mary Hoffman, Kevin Michael Kurtzner (virtual), Mary Lanier Berne (virtual), Christos Papadopoulos (virtual), David White, Lauren Wiese, Emily Willett, Abbey Janssen, Kyla Swearingen, and Alexandra Thomas (Board Liaison) (virtual)

Staff: Lauren Carr

Not Present: [Click here to enter text.](#)

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 Thursday, January 27, 2022, in Orlando, Florida.	N/A
Agenda Approval	The meeting agenda was approved as submitted.	N/A
Minutes Approval	The minutes from CONYM's 2021 meeting were approved by consent.	N/A
Board Liaison Report	<p>Dr. Alexandra Thomas, 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 new strategic plan for the next three years is in development and will be released soon• The strategic plan will focus more on programming and membership value for new and younger members, associates, and non-practice owners• The BOT will be adding 1 or 2 At-Large Trustee positions. More information can be found here: https://www2.aaoinfo.org/calling-all-members-at-large-trustee-application-now-open/	N/A

<p>NYM Trends & Market Share Report</p>	<p>AAO staff member Lauren Carr (filling in for 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. The presentation slides can be found here.</p> <p>Lauren (on behalf of 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="358 474 1276 821"> <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>72</td> <td>28</td> <td>38.9%</td> </tr> <tr> <td>Hoffman</td> <td>PCSO</td> <td>81</td> <td>40</td> <td>49.4%</td> </tr> <tr> <td>Kurtzner</td> <td>RMSO</td> <td>22</td> <td>14</td> <td>63.6%</td> </tr> <tr> <td>Papadop.</td> <td>NESO</td> <td>67</td> <td>34</td> <td>50.7%</td> </tr> <tr> <td>Shoukri</td> <td>GLAO</td> <td>36</td> <td>17</td> <td>47.2%</td> </tr> <tr> <td>White</td> <td>SWSO</td> <td>50</td> <td>27</td> <td>54.0%</td> </tr> <tr> <td>Wiese</td> <td>MASO</td> <td>33</td> <td>13</td> <td>39.4%</td> </tr> <tr> <td>Willett</td> <td>MSO</td> <td>30</td> <td>16</td> <td>53.3%</td> </tr> <tr> <td></td> <td>Totals</td> <td>391</td> <td>189</td> <td>48.3%</td> </tr> </tbody> </table>	CONYM Rep	Constituent	# Started With (10/20/20)	# Members Renewed (1/6/21)	% Renewed (by 1/6/21)	Berne	SAO	72	28	38.9%	Hoffman	PCSO	81	40	49.4%	Kurtzner	RMSO	22	14	63.6%	Papadop.	NESO	67	34	50.7%	Shoukri	GLAO	36	17	47.2%	White	SWSO	50	27	54.0%	Wiese	MASO	33	13	39.4%	Willett	MSO	30	16	53.3%		Totals	391	189	48.3%	<p>CONYM to continue non-renewal outreach efforts annually.</p>
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<p>Fall 2021 Pulse Survey Recap</p>	<p>Lauren Carr (on behalf of Brandon) shared results from the fall 2021 Pulse Survey. The following are key takeaways:</p> <ul style="list-style-type: none"> • The key reason for the ratings declines was related to a perceived lack of advocacy/ protection of the profession. • Members believed that the primary role of the AAO should be advocacy/representation/ protection of the profession. • Members routinely suggested that, in order to increase its perceived value, the AAO should increase its advocacy efforts, both to the public and via lobbying/legislative efforts. • The AAO also needs to better communicate its efforts to members. A lack of awareness contributes greatly to the depressed value perceptions. • Despite value perception declines, virtually all members are still committed to membership in the AAO. There is an absolute need for professional organizations such as the AAO. <p>The presentation slides can be found here.</p> <p>Discussion:</p> <ul style="list-style-type: none"> • CONYM and other volunteer leaders can be an information resource in ortho Facebook groups • Facebook use may be declining and AAO should consider having a presence on other social platforms (e.g., Discord) as they increase in popularity 	<p>N/A</p>																																																		
<p>Membership Resolutions Impacting NYMs</p>	<p>CONYM member Dr. Mary Lanier Berne provided an overview of membership resolutions from Council on Membership, Ethics & Judicial Concerns (COMEJC) that will impact NYMs:</p> <p>COMEJC has recommended updating membership applications and profiles to include the following gender options:</p> <ul style="list-style-type: none"> • Female 	<p>N/A</p>																																																		

	<ul style="list-style-type: none"> • Male • Non-binary/third gender • I use another term • Prefer not to say 	
<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</p> <p>CONYM Chair Dr. Brandon Shoukri shared his involvement on a joint COOP/CONYM subcommittee to develop an online lecture series for orthodontic office design. Modules will include:</p> <ul style="list-style-type: none"> • Planning Your Office Design Project • Determining Your Practice Needs • Owning vs Leasing • Financing Your Project • Site Location & Details • Major Equipment and Software for Your Practice • Office Design Layout & Interior Design <p>Initiative #2: Practice Management</p> <p>CONYM members Drs. Mary Lanier Berne and Mary Hoffman are collaborating on a subcommittee with Drs. Valerie Martone and Marie Lathrop from the Special Committee on Women Orthodontists to identify content needs for women preparing and returning from maternity leave. The following potential resources were discussed:</p> <ul style="list-style-type: none"> • Develop sample coverage agreement between local orthodontists • Develop sample contract for hiring a locum tenens orthodontist in your office • Develop sample communications that members can use to share maternity leave plans/status updates with patients, including birth announcements and plans for returning to practice • Develop checklists to help women prepare and return from maternity leave • Develop articles for various topics: compilation of tips, personal stories, and recommendations from other moms; considerations for other doctors and staff in the office while on maternity leave; what to expect as an ortho mom; how to structure time back in the office as a new mom; how to divide mental energy between work and home; what employers can do to advocate and support new moms • Promote primary caregiver dues waiver for AAO members • Promote accommodations for parents and breastfeeding moms at Annual Session and other AAO meetings • Include “parenting” conversation topic for the online mentoring platform (completed) 	<p>Subcommittees to continue working on initiatives.</p> <p>CONYM to consider collaboration with COMEJC on financial management program for residents.</p>

Initiative #3: Financial Management

CONYM member Dr. David White presented at GORP 2021 in St. Louis with content inspired by the book, *The White Coat Investor: A Doctor's Guide to Personal Finance and Investing*. The presentation focused on tips around student loan refinancing, initial investment decisions, and saving goals.

Dr. Shoukri discussed an idea to develop an educational video series on student loans. He shared the following example from Michigan Dental Association: <https://www.michigandental.org/government-insurance/student-debt-resource-center/>.

Lauren Carr suggested CONYM collaborate with COMEJC on an existing resident financial management video series that is offered alongside the AAO Resident Vitals presentation. In its current format, residency programs must elect to offer this series with one of our volunteer moderators. Due to limited access, there has been discussion to transition this program online and start fresh with a similar format to the office design series. The following topics have been discussed; however, there may be a need to add a topic specifically about student loans for early knowledge and intervention.

Part 1: Financial management for individuals

- Personal money management (e.g., career options, income, personal and family expenses, saving and budgeting strategies, debt management)
- Personal insurance needs (e.g., medical, disability, life, automobile, homeowner, excess liability, professional liability)
- Retirement planning (e.g., social security, private savings and assets, retirement savings and pensions)
- Personal tax strategies
- Estate planning

Part 2: Financial management for orthodontic practices

- Financial decisions for practice ownership (e.g., practice financing, expenses, value, legal entities, advisors, start-up vs. purchase, becoming a DSO/OSO, selling to a DSO/OSO, etc.)
- Business finance basics (e.g., overview of financial terms and statements)
- Financial analysis and control (e.g., financial planning and reporting, measuring performance, success factors)
- Business tax strategies
- Financial risk management (e.g., office risks and liabilities, insurances, employee benefits, etc.)

Dr. David White mentioned that student loan content should discuss repayment strategies, including a write off option after 25 years. Many do not know about or understand this strategy.

Lauren discussed an idea to link student loan content with residency program information (which include tuition amounts), so that potential

	<p>residents can find information and plan a financial strategy.</p> <p>Other initiative ideas related to clear aligners or all things digital:</p> <p>CONYM discussed aligner education since it is often excluded from residency programs. It was suggested to offer scholarships for the Aligner Intensive Fellowship program.</p>	
AAO Connections	<p>Lauren Carr gave an overview of AAO Connections (peer mentoring program), which included the following discussion points:</p> <ul style="list-style-type: none"> • Participation is low but post-session feedback is excellent • Email recruitment hasn't been the most effective approach • Grassroots promotion may be necessary to build awareness and participation <p>CONYM agreed to assist with a "presentation campaign" to share information with volunteer leadership groups (e.g., BOT, councils, constituents) and encourage them to "champion" the program by recommending to others, recruiting advisors, participating, and finding opportunities to use the platform for their initiatives.</p> <p>Other ideas include a personalized mentor nomination and recognition campaign, allowing AAO to send special thank you notes to past mentors on behalf of members and encouraging them to volunteer for AAO Connections. Annual Session will also be considered for additional promotional opportunities.</p>	<p>Staff to develop presentation campaign and reach out to volunteer leadership groups to schedule time on upcoming meeting agendas.</p>
New Orthodontist & Resident Conference at AAO Annual Session	<p>The 2022 New Orthodontist and Resident Conference at Annual Session is scheduled on Saturday, May 22, 11:30am-2:00pm in Miami, Florida.</p> <ul style="list-style-type: none"> • The event will feature one TED-style presentation (about 20-25 minutes long using a storytelling approach) • 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 2022 Annual Session are requested to attend and assist with this program.</p> <p>Planning committee members for the 2022 program will be determined during a future conference call.</p>	<p>Staff and planning committee to identify speakers and volunteer moderators and continue marketing event.</p> <p>Committee members to be identified and begin planning following 2021 Annual Session.</p>
Annual Session Programming for NYMs	<p>The council will be asked to review the 2022 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</p>

		request feedback from the council.
New and Younger Member Articles	CONYM decided to discontinue its initiative to write or request article contributions for the eBulletin.	N/A
Member Interest Groups	<p>CONYM member Dr. Emily Willett gave an overview of AAO Member Interest Groups, which included the following discussion points:</p> <ul style="list-style-type: none"> • Member Interest Groups (MIGs) are peer-to-peer collaboration groups, created around a shared interest in specific areas of knowledge, learning, technology and other characteristics of membership. • The MIG program is led by a Steering Committee that maintains strategic oversight of all MIGs. Individual MIGs are led by a Chair, Vice-Chair and Staff Advisor. General AAO membership will drive the success of MIGs through participation and collaboration. • Each MIG will use the following virtual and in-person collaboration methods: Facebook groups, Annual Session meetings, and virtual/Zoom meetings. • How it works: 1) Member identifies a MIG that is of interest to them; 2) Member joins the MIG (at no cost) via closed Facebook group; and 3) Member participates in online discussion and attends in-person/virtual events. • MIG topics to be introduced in 2022: craniofacial and special needs patients; human resource management; financial freedom; and leadership and development. • Look for more information on AAO Member Interest Groups in member communications in early 2022 	N/A
Qlark (Online Orthodontic Resource)	<p>CONYM member Dr. Lauren Wiese gave an overview of Qlark (https://qlark.com/), a doctor-led, HIPAA compliant social learning platform (previously OrthoScience started by Dr. Sean Carlson). It features a variety of lectures for purchase and topic-oriented social “spaces” that are similar to Facebook groups. Some spaces are interactive, allowing you to view cases, submit responses to questions (anonymously), and compare your answers to others.</p> <p>CONYM members are asked to explore the site, provide feedback for improvement, and consider its potential use by AAO as a tool to communicate with members and feature educational content.</p> <p>It was suggested for AAO to have an early presence on Qlark based on its potential to gain momentum and popularity among the orthodontic community.</p> <p>Anonymity was discussed as an important feature for case studies and resident participation. A suggestion was offered to give participants the choice to communicate anonymously as opposed to it being the sole default setting (if that’s how it’s currently set up).</p>	CONYM to explore Qlark and share feedback.

CONYM Brainstorm	<p>The council discussed potential challenges and concerns of NYMs that AAO can address:</p> <ul style="list-style-type: none"> • Focus/identify needs of women orthodontists, associates, and OSO/DSO employment as these demographics increase among new and younger members • Consider changing mentality of younger members and desire for more work-life balance • Educate members about alternative/emerging practice models, employment trends, flexible ownership/partnership arrangements, office trends like staffing, virtual work, outsourcing, etc. • More education about associate contracts, terms, and issues 	
Representation on Councils & Committees	<p>The following NYM council advisor appointments were identified for 2022-23:</p> <p>COC – Dr. Emily Willett COE – Dr. Lauren Wiese COMEJC – Dr. Mary Lanier Berne COOP – Dr. Mary Hoffman CTECH – Dr. Brandon Shoukri COHC – Dr. Christos Papadopoulos</p> <p>An appointment still needs to be identified for COGA.</p>	Staff to reach out to incoming council members regarding open COGA appointment.
GORP (Graduate Orthodontic Residents Program)	<p>A CONYM representative is asked to attend each GORP meeting, which is next scheduled for August 4-7, 2022, in Ann Arbor, Michigan. The CONYM Chair will appoint a representative to attend. Dr. Swearingen volunteered to attend if needed.</p>	CONYM representative to participate as planned.
American Student Dental Association (ASDA) Annual Session	<p>Dr. Swearingen will be representing AAO/CONYM during the Dental Expo at the 2022 American Student Dental Association (ASDA) Annual Session in Louisville, Kentucky (Saturday, February 18 from 12:00 - 2:30pm).</p> <p>A CONYM representative for the 2023 event will be selected in summer 2022.</p>	CONYM representative to participate as planned.
Council Chair Election	<p>The following individuals were nominated for council chair for 2022-23:</p> <ul style="list-style-type: none"> • Dr. Lauren Wiese (MASO) • Dr. Mary Hoffman (PCSO) • Dr. Emily Willett (MSO) 	TBA
Next Meeting	<p>The next meeting will take place in St. Louis, Missouri. The meeting date is to be determined.</p>	CONYM to confirm meeting date.
Adjournment	<p>Having no other business, the meeting adjourned at 1:00pm.</p>	N/A

Annual Budget
(Feb.)

Previously approved via email ballot on January 6, 2022, the 2022-23 CONYM budget as proposed:

Council Meeting	\$16,893
Annual Session Stipend – Chair	300
Annual Session Stipend – Residents	1,000
GORP Travel (1 representative)	1,300
Mentoring Program Software	15,000
	<u>TOTAL \$34,493</u>

Nomination of Council Chair (Annually, Nov. or Feb)	Name	Constituent
February	Dr. Lauren Wiese	MASO
February	Dr. Mary Hoffman	PCSO
February	Dr. Emily Willett	MSO

Future Reference or Archive

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

N/A