

NEWSLETTER of the Southwestern Society of Orthodontists

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President’s Message

Dr. Mike Mizell, President SWSO

As I take time to write this note for the fall newsletter, I get excited that fall is approaching, which means cooler temperatures and college football. I also hope it will bring rain to the areas of the SWSO region that are suffering from the current drought.

It has been a pleasure for me to serve as president of the Southwestern Society of Orthodontists. My last four years on the executive committee have been educational, interesting, and a lot of fun. I want to thank my fellow board members and all the committee members who devote their time and talents to organized orthodontics.

I would like to give special thanks to our AAO Trustee, Gayle Glenn, for her exceptional efforts representing our society on the national level. Gayle will complete her eight-year commitment as our Trustee in at the AAO annual session in May. We will elect our new Trustee during the 2011 SWSO Annual Session in October.

I hope you all plan to attend the SWSO annual session, “Rendezvous on the Bayou”, October 13th – 16th in Houston. We have an excellent slate of speakers for the doctors and staff to go along with all the entertainment opportunities in the Galleria area. Be sure to visit our newly designed website at SWSO.org. You can review the annual session details and print registration materials from the website.

From the Editor

Dr. Kirt E. Simmons, Editor, SWSO Newsletter

Are You Ready for Big Brother?

Some of you may know I am one of the “point people” for organized dentistry’s (the ADA and AAO) role in the implementing the electronic health record (EHR). I wrote a TechnoBytes article in the AJODO recently concerning how I believe it will (can?) be implemented in the orthodontic office in the quite near future. In this capacity I also try to monitor what the Federal government is saying about the future of the EHR, their “vision” for it, and their “vision” for the future of health care in this country. The Office of the National Coordinator for Health Information Technology (the ONC) recently “bragged” in a blog about an article published in the NEJM (September 1, 2011- “Electronic Health Records and Diabetes Care). This **research** article “...adds to the growing body of evidence showing that electronic medical records (EHRs) enable providers to deliver higher quality care to the patients they serve.” (underlines theirs- from ONC blog by Farzad Mostashari, MD 9-2-2011). The fact the ONC Director would brag about this article is understandable—the current administration has bet big and spent large sums of money and committed even more to the development and implementation of the HER, citing reduced costs and improved care as justification for these commitments. And indeed, there are many potential benefits possible with an EHR. But if one looks at the article with a wary eye and a knowledge and background in what the EHR is also capable of and what else is going on in the public and private sectors paying for health care, a more ominous potential can be gleaned by “reading between the lines.” This study examined 27,000 diabetes patients and found physicians using EHRs were “...significantly more likely to receive care that aligns with accepted treatment standards, and had better outcomes...” than those being treated by physicians using paper records. The blog further states “Annual improvements in ... care standards and quality outcomes were faster...” and the benefits were “...widespread across different types of practices ... treating patients covered by different types of insurance...”. The blog further points out in a “**Worth Quoting**” section “These findings support the premise that federal policies encouraging the meaningful use of EHRs may improve the quality of care across all insurance types.” The last section of the blog starts out with this sentence “Findings from the study support the premise that Federal policies to encourage the adoption and meaningful use of EHRs are a key element of transforming care delivery.”

Sounds all perfectly wonderful on the surface, but consider these “opportunities” that an EHR allows federal regulators/policy makers and payers (private and public) that are hinted at in the above and have been openly proposed in more technical publications. For instance, the ability to monitor “parameters” of care denoting “quality of care,” speed of care, “efficiency” of care, safety of care, level of care, sources of payment of care, number of patient visits, number of “untoward” outcomes/emergency visits, cost of care, use of “care that aligns with accepted treatment standards,” etc. So how could all this possible affect an orthodontist, or any other dental provider? Consider one probable measure proposed for implementation that the EHR will allow—lifetime radiation dosing. This will provide an actual monitored dose history for every patient for their lifetime for EVERY exposure to ionizing radiation, include panoramic, cephalometric, CBCT, and even bite-wing and periapical radiographs. How could this be used? For example it could be used by payers to allow/deny payment for radiographs that do or do not “align with accepted treatment standards” (Who gets to define those?), by federal/state agencies to monitor “costs” and “danger” to the public (potentially providing new regulations), by legal entities to identify potential malpractice suits, by regulatory agencies to ensure your equipment is being operated/maintained properly, and by patients to monitor their care versus that supplied to an “average” patient or anyone they care to compare their dose history with. The EHR also potentially provides payers the ability to “grade” health care providers based on their “outcomes,” in terms of their defined “quality” measures, which could be number of visits, direct costs, length of treatment, number of emergency visits, length of visits, number/type/costs of referrals made, number/type/costs of “ancillary services” charged, etc. Payers will be able to generate averages for all these measures and then determine what they deem acceptable and unacceptable and

either reward or “fine” providers who differ statistically from these “accepted standards.” And this very thing has been pointed out as a way to improve care and reduce costs. I do not believe the payers (at least the public ones) will differentiate between specialists and generalists, at least not initially. They will be basing their “standards” on care provided by all payers for certain “procedures” (think ADA CDT codes) possibly cross matched by diagnosis codes (which is another thing coming to dentistry most people are not aware of—I have been required to enter “medical” diagnosis codes on all my charge sheets at the hospital for years, like all physicians are required to, and you will have to also). So if, as I have heard for years, most of the orthodontic services are in fact provided by non-orthodontists, most of the data generated will be from these providers and decisions will be made affecting us individually potentially more than other providers who do more than just orthodontics. Of course, it should also be possible to potentially “break out” care provided by orthodontists vs. other providers and compare these “quality measures” between those two groups. Hopefully the results of such comparisons would support our specialty status, but I fear such studies could be manipulated to “prove” the contention of the group conducting the study, recalling Mark Twain’s feelings about lies and statistics. It’s a brave new world coming with an ever bigger brother watching over our shoulder and influencing our lives and livelihood. Be aware and be prepared. See you in Houston!

Trustee Report

Dr. Gayle Glenn, SWSO Trustee and AAO Secretary-Treasurer

This is my 8th and final year as your SWSO Trustee, and I am also currently serving as the Secretary-Treasurer of the AAO. On October 15, 2011, SWSO members will elect our new Trustee. We are fortunate to have two highly qualified individuals who have expressed interest in serving in this capacity. The announced candidates are Ken Dillehay from Kansas and J. Mark Felton from Oklahoma. Please plan to attend the upcoming SWSO Annual Session in Houston to cast your vote during the business breakfast on Saturday morning. President Mike Mizell and his meeting planning committee have put together great scientific programs for both orthodontists and staff. Don’t miss the opportunity to connect with your colleagues and friends October 13-16, 2011 for a Rendezvous at the Bayou!

The AAO has a new logo! You can add the member logo to your practice materials now. The files are posted on www.AAOinfo.org under the “My Practice” tab. Look for “Support Materials and Forms”; a link to the logo files is under the “Marketing” heading.

The 2012 Professional Advocacy Conference will be held January 23-25, 2012 in Washington, D.C. If you have legislative contacts or are interested in attending the conference, please contact our Council on Governmental Affairs representative, Scott Hamilton, or Kevin Dillard at the AAO.

Registration is now open for the AAO Mid-Winter Conference “Age-Appropriate Treatment of the Developing Occlusion: Common Problems—Consensus Solutions.” This conference is co-sponsored by the American Academy of Pediatric Dentistry and will be held January 27-29, 2012 in Marco Island, Florida. Topics will include crowding and space management, missing teeth, treatment of developing crossbites, protection of teeth during orthodontic treatment, adolescent patient motivation and learning issues, and new technologies in the diagnosis and management of orthodontic problems. Registration is open to AAO and AAPD members at www.AAOinfo.org.

Registration will open October 3, 2011 for the 112th AAO Annual Session to be held May 4-8, 2012 in Honolulu, Hawaii. Online registration is easy to use, convenient and guarantees the fastest confirmation of your registration and housing.

The AAO Strategic Plan and **Critical Issues** are continually reviewed and updated. The 2011 House of Delegates approved the following list of critical issues:

1. Consumer Awareness
2. Operating, Marketing and Cost Management of an Orthodontic Practice
3. Advocacy/Government Affairs
4. Relationships with General Dentists and Other Healthcare Professionals
5. Transition of Recent Graduates to Practice—Practice Opportunities and Manageable Student Debt

Year six of the **Consumer Awareness Program** began June 1, 2011 and is taking a new direction. The Consumer Awareness Campaign (CAP) is funded through May of 2013 by an assessment of \$650 per active member. A new advertising agency has been selected—Athorn, Clark and Partners in New York City. We are also in negotiations with a new public relations firm. These two firms will be charged with managing the AAO’s consumer outreach. The campaign’s first goal is to increase consumer demand for orthodontic services. This will be done by adding outreach to potential adult patients in addition to our traditional “mom” market. The message will continue to stress 2-3 years of additional education necessary to become an orthodontist. New ads are being tested with our target consumers. Watch for the final products in selected magazines, on cable TV and on the Web. The materials developed in support of our new campaign and expanded audience will be made available in the Advertising/Marketing Online Toolkit. The new materials can be used to extend the campaign into your community. In October, the consumer Web site URL will be changing to brand it with our new campaign: **yourlifeyoursmile.org**.

Operating, marketing, cost management of an orthodontic practice is another of our critical issues. We will be doing another series of educational Webinars to bring members information on areas such as practice management, OSHA, infection control, business practices, risk management, and practice finances. The AAO Distance Learning Program has an extensive collection of lectures including many hours on the business side of an orthodontic practice. Access is easy and affordable with a subscription fee of \$100 per year for unlimited access. The AAO also posts a free lecture on the home page of www.AAOinfo.org every month.

There is a new dues structure for our Orthodontic Staff Club. You can enroll your entire staff for a flat fee of \$50 per year. All of your staff members will be entitled to the full range of benefits—from free distance learning to a discount on Annual Session registration. The AAO recently launched a voluntary staff certification program for clinical assistants. This program recognizes high levels of knowledge and proficiency. Those who meet the criteria earn the Specialized Orthodontic Assistant designation.

Advocacy, government affairs and access to care are among our critical issues. A portion of what we do is in concert with the ADA. The August 2011 meeting between ADA and AAO Officers and Executive Directors was very productive and marks a continuing improvement in our relationship with the ADA. The participants reviewed advocacy issues including the upcoming Congressional agenda, barriers to care programs and items being proposed by the ADA House of Delegates.

The AAO Council on Governmental Affairs helps members get in touch with legislators through the Legal and Advocacy section on www.AAOinfo.org, under the “My AAO” link. Also, under the “Resources” section, you will find the AAO’s Access to Care Guide. With another election looming, AAOPAC needs our support more than ever. AAOPAC supports political candidates whose views are favorable to the AAO.

Relationships with general dentists and other healthcare professionals continue to be important to the AAO. We meet regularly with the ADA and other organizations of general dentists and dental specialists, including the Dental Specialty Group (DSG). Representatives from the AAO Board of Trustees will attend the ADA Annual Session in Las Vegas October 9-13, 2011. A dessert reception will be hosted by the AAO on Monday, October 10, serving ice cream and cordials at the MGM Grand Hotel.

Last winter, the AAO and 21 other dental organizations participated in the second annual Nation Roundtable for Dental Collaboration. An outcome of that meeting was an agreement to work collectively with the Ad Council on development and distribution of a message intended to improve the oral health of children. You are likely familiar with the Ad Council's work, as they have been involved in iconic campaigns including Smokey the Bear, "Take a Bite Out of Crime," and "You Can Learn a Lot from a Dummy." Our dental campaign is called "Partnership for Healthy Mouths, Healthy Lives." Watch for it to debut in 2012 in electronic and print media.

Transition of recent graduates into practice, practice opportunities and manageable student debt is the last of our critical issues. We continue to present Webinars for residents on practice transitions and academic careers. Enhancements have been made to the Practice Opportunities Service. This free service is designed to match AAO members with practice opportunities. Matches include associateships, partnerships and purchase/sale of practices. Frequent updates to the candidate database insure that candidates listed are still seeking positions. Confidentiality initiatives include a personalized screening process by a dedicated AAO staff person. In this calendar year, there have been 53 known matches—a real success story! Another service is the online Academic Career Center, which allows qualified academic faculty candidates to search for full-time or part-time faculty positions. For more information, contact Merleen Holman at the AAO.

The AAO has increased its participation with its FaceBook, YouTube, and Twitter sites. As of this date, AAO's FaceBook site has 4,000 followers. Additional videos, games and interactive items will be added over the next 12 months. AAO has also created a special site for orthodontic residents to participate within their own AAO sponsored community.

OTHER NEWS:

The AAO House of Delegates approved the formation of a Credit Union, which will launch in the spring of 2012. Members will have the opportunity to save and borrow money at attractive rates.

The Donated Orthodontic Services (DOS) pilot program, tested in five states, has been successful. The BOT approved a new business plan that will allow other interested component organizations to use the "template" created by the pilot program to launch their own DOS programs if they so choose. The new business plan relies on a fee of \$150 for those patients participating to offset the administrative costs, plus donations from industry or community partners. For further information, please contact Ann Sebaugh at the AAO.

Nominations are currently being accepted for the AAO Humanitarian Award. AAO constituent and component organizations and individual members are eligible to submit nominations. The award is designed to recognize significant contributions to improve the quality of human life that extend beyond the usual scope of private practice, academic functions or organized dentistry. Two letters of nomination and the nominee's CV or resume must be mailed to Carla Qualls at the AAO by March 30, 2012. The award will be given during the following AAO Annual Session. A monetary award of \$1500 will be given to the recipient to cover travel and room expenses to attend the award ceremony.

Plans are now underway for the 2014 AAO Annual Session to be held in New Orleans. Mel DeSoto will serve as General Chair of the meeting. Other members of the Planning Committee include Doctors' Program Co-chairs Peter Sinclair and David Sarver; Staff Program Co-chairs Dean Jensen and Sarah Pollan White; Featured Speaker Series Chair Mark Felton, and Local Arrangements Chair Carol Stuckey. We will need additional members of the planning committee in the future, so please contact me if you would like to help.

As AAO Secretary-Treasurer, I will be attending the GLAO/MASO joint meeting in Pittsburgh and the PCSO meeting in Vancouver in September. I will also attend the ADA Annual Session in Las Vegas immediately prior to our SWSO meeting in Houston. Thank you for the opportunity to represent the SWSO on the AAO

Board of Trustees. If you have any questions, or if you want to become more involved in activities that impact our specialty, please contact me at 214-696-3082 (work) or 214-520-2481 (home).

2011 AAO House of Delegates Report

Dr. J. Mark Felton, Delegation Chair

The 2011 AAO House of Delegates was very busy this year with the adoption of multiple resolutions. Many other resolutions were referred to various councils, task forces, and committees, with reports due back for the House of Delegates next year. The members of your Southwestern Society Delegation were very diligent in their participation. The delegation this year included delegates: Drs. Clark Colville, Mark Felton, Devek Frech, Dean Jensen, Steve Robirds, and Kirt Simmons; and alternate delegates: Drs. Ken Dillehay, Mike Mizell, and Mike Ragan.

--Dues Amount Amended

An increase in yearly dues for AAO Active and Active Life Members for the first time in 10 years was adopted by the HOD. Active Members will pay an additional \$43 in dues for a total of \$788. Active Life Members will pay a total of \$394. Additionally, a \$650 annual assessment for AAO Active and Affiliate Members will be levied during the fiscal years of 2011-2012 and 2012-2013 to continue the Consumer Awareness Program.

--AAO Mission Statement Modified

The AAO Mission Statement was modified as follows to reflect changing parameters of our organization:

The American Association of Orthodontists is a professional association of educationally qualified orthodontic specialists dedicated to:

- * ethically advancing the art and science of orthodontics and dentofacial orthopedics worldwide*
- * improving the health of the public by promoting quality orthodontic care, the importance of overall oral healthcare, and advocating for the public interest*
- * educating the public about the benefits of orthodontic treatment and the educational qualifications of orthodontic specialists*
- * supporting AAO members in the practice of orthodontics.*

--Revision of AAO Policy on Reserves

A resolution was adopted that amended the AAO Policy on Reserves. Upon careful review of the AAO Policy on Reserves, the AAO Board of Trustees brought forth a resolution recommending two changes to the policy that would help in making the AAO more financially stable and secure. The recommended changes incorporated best practices to result in a more accurate calculation of liquid and excess reserves:

- *Eliminates the “two step” process of the Board of Trustees considering expenditure from reserves before presentation of the Reserves Calculation to the House of Delegates.*
- *Provides for a longer history (36 months versus 24 months) of liquid reserves in order to provide an average that is less influenced by erratic fluctuations in cash balances, investment market value and month-end liabilities.*
- *Matches the periods (36 months each) for the average expense calculations and liquid reserves calculations, which will result in a more accurate calculation of Excess Liquid Reserves.*

--Changes to the AAO Principles of Ethics and Code of Professional Conduct

A resolution was adopted directing the AAO to communicate changes to the *AAO Principles of Ethics and Code of Professional Conduct* to all members in a timely manner.

--Graduate Student Dues Status Relative to Graduation Dates

With more and more graduate orthodontic programs finishing their programs in varied months, a resolution was adopted which removes a time conflict relative to AAO Student Membership status for students graduating in the months of January to May.

--Governance Restructure Study

In order for the AAO to be structured in the future to be positioned to maintain relevance with the changing demographics and lifestyles of our volunteer base, a task force of the House of Delegates will be appointed to study the geographic configuration, structure, and governance of the AAO. The task force will include one representative selected by each constituent organization, a Board liaison, and co-chaired by the 2012 and 2013 Speakers of the House, with a report due at the May 2012 AAO House of Delegates.

--AAO Donated Orthodontic Services (DOS) Funding

The AAO will continue to provide funding of up to \$50,000 to the Donated Orthodontic Services program in fiscal year 2012 with the funds distributed among the five original pilot states. Additionally, a business plan will have to be developed on how the DOS program can be self-funded beginning in Fiscal Year 2012-13.

--Publication of AAO Constituent Fact Sheet and Listing of AAO Committees Online

The Constituent Fact Sheet will be published and retained in a secure portion of the AAO Member website. As AAO Members, this action will benefit you in being able to easily view ongoing actions of various AAO Councils and Committees. Look for the notice on the website as to when the fact sheets will be posted online.

Additionally, when appropriate, all active AAO committees will be listed on the AAO Members Website displaying the purpose of each committee, committee members, and their contact information.

--AAO Strategic Plan Amendments

There were amendments to the AAO Strategic Plan to help promote interaction with general dentists and other healthcare professionals, and areas of governmental advocacy.

Goals of this action are to:

- 1. Identify barriers to cooperation so that they may be addressed and removed where possible.*
- 2. Identify areas of common interest so that the public may be better served.*
- 3. Encourage member involvement in the ADA, ADEA and other professional organizations.*
- 4. The AAO maintain an ongoing dialogue with the ADA and other professional organizations in order to preserve the integrity of the referral relationship.*

Additionally, the success of these actions will be determined by the use of surveys to appropriate groups to determine the level of awareness of the benefits of orthodontics and the qualifications of orthodontic specialists, and measure referrals made to orthodontic specialists.

In the area of Governmental Advocacy, AAO Members will be encouraged to participate in local and federal advocacy efforts so that they may continue to serve the needs of the public. Goals in these areas will include the development of coalitions to advocate for members' interests as small business owners. Also, interacting with the ADA and other dental organizations to increase access to medically necessary orthodontic specialists for patients in need. To measure the success of these programs, the identification of legislative success will occur on an annual basis.

--Adoption of new AAO Logo

We have a new Logo! Previously, a task force had been established to determine the possibility of creating a new logo. The House of Delegates voted to adopt the new logo. You can access copy-ready versions on the AAO Members Website for use on your office stationery. AAO Members may use the existing logo until May 13, 2013.

In another Logo-Related area, you may be aware the ADA had recently created a *Recognized ADA-Specialty Logo* to be used by the various ADA-recognized dental specialties. In the opinion of a number of AAO members the logo design was underwhelming. Therefore, the AAO House of Delegates passed a resolution that the AAO solicit support of other recognized dental specialty organizations to esthetically update, verbally enhance, and omit reference to any specific year of the ADA-recognized specialty logo and take any recommendations for changes to the ADA. A report back to the AAO House of Delegates is forthcoming.

--Society of Orthodontic Educators Created

The formation of the Society of Orthodontic Educators (SOE) was approved by the AAO House of Delegates. The SOE will be structured as a subset or committee of the Council on Orthodontic Education, and governed by the Governing Guidelines, which were distributed during the 2011 AAO House of Delegates Meeting. These guidelines shall be edited as required by the AAO Governing Documents Committee.

--Consumer Awareness Program Assessment

A \$650 annual assessment for all U.S. and Canadian active and affiliate members (active academic members excluded) will be levied during Fiscal Year 2011-12 and Fiscal Year 2012-13 for the purpose of continuing the Consumer Awareness Program.

Related to this action, in order for the AAO House of Delegates to evaluate the activities of the Consumer Awareness Program, the Council on Communications has been directed to provide a report to the HOD summarizing these activities from the previous year and all available data to show the effectiveness of the campaign no later than February 15th.

--Revision of House of Delegates Policy for Nominations for AAO Distinguished Service Award

Nominations for the *James E. Brophy AAO Distinguished Service Award* shall come from the constituent organizations and be limited to one nominee per constituent per year. In addition, any group of five or more AAO members may make a nomination. All nominations shall be submitted to the AAO Central Office no later than March 30 for the year following.

Council on Communications Report

Dr. Devek Frech, SWSO Representative to COC

Our council is responsible for creating and improving communications between the AAO members, other professionals, and the public. All materials produced are reviewed by the Board of Trustees, AAO staff, and legal counsel, prior to being released. The council met July 22-23rd. I would welcome any ideas or suggestions that you might have regarding this council. Nahid Maleki from the MASO serves as the trustee liaison this year. We appreciate Nahid's insight and dedication to our council and our profession.

Consumer Awareness Program

The Board of Trustees and the COC have selected new vendors for the consumer awareness campaign. *Athorn, Clark & Partners (ACP)* will run the ad campaign. ACP presented to the COC and the COHC during our summer meeting. New ads are currently in testing and are being shared with target audiences. Ads will appear in national target audience magazines, on cable TV, and on target web sites. Ads will feature Quick Response codes that will enable those with iPhones, Androids, and Blackberries to be driven to the AAO's consumer web site. *Millward Brown*, an internationally known market research firm will measure our results. Adults will be targeted in some of the new ads. A new public relations firm, *Ruder Finn (Finn Partners)* has been selected to run the PR portion of our campaign. A new consumer web site, youlifeyourmile.org is slated to launch October 1. The AAO staff and leadership will be working closely with Athorn, Clark & Partners to educate the AAO membership about the campaign. Information on how advertising at a local level will help spread the word that

orthodontists have 2-3 years of education beyond dental school and are specialists in aligning and straightening teeth are in the works. There will be an annual report to all members regarding the campaign as well as the usual reports at the ad interim and annual session on the campaign. The COC will continue to place articles in the bulletin and the AJO-DO, as well as the email blasts. We are also investigating the need for a possible program at the AAO annual session showcasing different ways that members may customize the Consumer Awareness program materials. The council also recommended the addition of a Consumer Awareness Campaign section to the AAO member's website to better inform the membership. Frequently asked questions, campaign research results, the campaign history, past articles related to the campaign, and other campaign related items will all be in one place for members to review.

Presentations

A *career day presentation* will be updated and tailored to different audiences (middle school, junior high, and senior high school). Once completed, this will be available for download on the membership website. A *presentations for younger children* has been suggested. The AAO currently offers "*Healthy Smiles*" (PowerPoint and DVD, both for-sale items) for members to use with students in grades 3-8. A request has been made for a program to present to students in grades K-2. The goal is to make the presentation available for download on our website.

Outreach to Healthcare groups

The COC would like to make arrangements for orthodontists to speak at local and regional meetings sponsored by the following professionals:

- Dental hygienists
- School nurses
- Pediatric nurse practitioners
- Pediatricians
- Speech pathologists
- Psychologists
- High school counselors
- Physicians' assistants

A calendar of local and regional meetings will need to be generated and will need to include key contacts at AAO component and constituent levels.

AAO / AAOMS Project

The COC is working in union with the AAOMS on a DVD or video presentation about surgical procedures for orthodontic patients. The filming was done August 12-13 in Chicago with Dr. Lee Graber as the AAO spokesperson and Dr. Spina as the AAOMS spokesperson.

AAO Member and Patient Census Study

This 2010 study highlights increases in patient starts and an increase in the total number of patients.

PSA Update

Mia Hamm "Play It Safe" TV and radio PSAs were released in mid-April 2011 to 1,000 U.S. broadcast TV stations, 500 U.S. cable TV operators, and 70 Canadian broadcast TV stations.

Brochures

The COC discussed the re-creation of all consumer education brochures in an 8.5 x 11 format that will be downloadable from the AAOmembers.org site. Once completed, all brochures will be reviewed by the COC, AC&P, Chris Vranas, Kevin Dillard, and Committee C of the board. Two brochures that will need to be added to the brochure series include a brochure about the negative side effects of soda and sports drinks and a decalcification brochure.

Ask AAO

COC made a motion for the AAO to explore the possibility of launching a 6-month pilot program titled “Ask AAO.” A question and answer site for consumers to ask questions and receive a response from an orthodontist. These questions and answers could be utilized in a FAQ section on the consumer web site as well.

Webinars

COC made a motion for all future COC mediated webinars to be archived on the member web site.

Marketing material is available to AAO members for print, radio, online advertising, and TV. Review the New Advertising / Marketing Online Toolkit posted on AAOinfo.org—“My Practice” section, Marketing subsection. The kit also includes info on media relations, key messages/talking points. Materials now in development will explain how to establish and utilize social media such as Twitter and Face book as well as promotional activities.

AAO Foundation Report

Dr. Jeffrey J. Thompson, SWSO Representative to AAOF Board of Directors

FOUNDATION AWARDS

For Awards Program funding in 2011, the Foundation Board of Directors approved 13 Orthodontic Faculty Development Fellowship Awards (OFDFA) and continued funding for the AAO Foundation Craniofacial Growth Legacy Collections Project (www.aaoflegacycollection.org). One of the participating collections, Denver Growth, is located within the SWSO.

The 2012 Awards Program was determined as follows:

- Call for Proposals/Education Innovation Award Planning Grant—\$50,000, with the specialty’s concerns with respect to craniofacial anomalies and special care patients included within this CFP and with the CFP to be in the form of a Planning Grant.
- Support of Junior Faculty—\$250,000
 - Orthodontic Faculty Development Fellowship Award—with a maximum of \$15,000 for any one OFDFA; the one-year option only (i.e., the 3-year option not offered for 2012); and proposals are invited that address the specialty’s concerns with respect to craniofacial anomalies and special care patients
 - Biomedical Research Awards—with a maximum of \$25,000 for any one BRA; to accommodate Mid-Career Academics, as well as Junior Faculty, the eligibility period is increased from maximum of 10 years full-time academics to 14 years full-time academics; and proposals are invited that address the specialty’s concerns with respect to craniofacial anomalies and special care patients.
 - The number and quality of the OFDFA and BRA proposals will determine which ones are funded, i.e., there are no designated amounts for either category.
- Collections Project—continued funding for the Collections Project (i.e., \$800,000 over two years, beginning in 2011) to be a function of demonstration of satisfactory progress; and with funding expected to result from the Foundation’s Restricted Gifts Campaign (“Legacy 300”), as currently authorized by the Board.

The Goals of the Foundation’s Awards Program:

- AAOF Mission is “to advance the orthodontic specialty by supporting education and research.”
- Foundation funding designed to ensure the future viability of the specialty, by investing in the next generation of educators and researchers.

Awards Outcomes to Date

Since 1994, the AAO Foundation Awards Program has provided \$8.0 million in funding, primarily in support of Junior Faculty, including:

- 138 Fellowship Awards
- 148 Research Awards
- Over 1,000 Gifts in Support of Orthodontic Education

Support for Junior Faculty has resulted in:

- Publications—over 100 articles and abstracts, most of which have been published in journals within orthodontics, but many in journals outside the specialty and the profession.
- Lectures—scores of lectures at dental, orthodontic and at other scientific meetings as well.
- Professional advancement—to date at the 70 graduate orthodontic residency programs in the U.S. and Canada there are:
 - 24 Department chairs and/or program directors funded while Junior Faculty
 - Numerous tenured, associate and full professor positions
 - Nine NIH funding recipients
- 80% of Junior Faculty supported by the AAOF remain in full-time academics after 5 years.
- On the AAOF web site, there are Final Reports from some 250 peer-reviewed, funded proposals.

CAMPAIGN

While continuing to support junior faculty, the AAOF's overall fundraising campaign, **Continued Commitment to the Specialty®**, will focus on support of the **AAOF Craniofacial Growth Legacy Collections Project** between now and December 31, 2011 as follows:

- A goal of a maximum of \$1.5 Million from no more than 300 pledgers (Legacy 300), restricted for this purpose, with pledges at a minimum of \$5,000 to be redeemed over as many as 5 years.
- Whether or not you have ever made a **Continued Commitment to the Specialty®** in support of the AAO Foundation, you are invited to make a restricted gift for the Collections Project.
 - For new pledgers or those who have completed their previous pledge(s), this would constitute a new pledge.
 - For those with open pledges, this would increase the total lifetime pledge by the amount pledged and would also increase the payment schedule accordingly.
 - Pledges are welcome from individuals, companies, and alumni associations, etc.
- To become one of the Legacy 300
 - Send an e-mail to aaofevp@aaortho.org
 - Noting the dollar amount (minimum of \$5,000)
 - Statement frequency (annually/quarterly)
 - Statement duration (maximum of 5 years), and
 - Stipulate that the pledge is to be restricted to the Collections Project
 - For example, \$25,000, with annual statements, to be redeemed over 5 years, restricted to the Collections Project.

To date this effort has realized just under \$900,000, with SWSO pledges of \$25,000 from the SWSO Board and \$5,000 pledges from SWSO members David Adame, J. Clifton Alexander, Kara Bailey, J. Kendal Dillehay, Randy Ellis, Fred Garrett, Jeffrey S. Genecov, Gayle Glenn, J. Dean Jensen, Percy E. Luecke, III, Lee A. Mahlman, Joel Martinez, Fred Massey, L. Donald Mayer, Michael L. Mizell, Michael H. Moore, Albert H. (Tripp) Owen, III, Daniel C. Peavy, Richard T. Phelan, Phillip J. Power, Anna Maria Salas, John R. St. Clair, Larry P. Tadlock, Jay W. Vincent, John B. Wise, and Mike Woehst.

FOR MORE INFORMATION

The AAO Foundation web site may be reached either through the AAO Members web site (www.AAOmembers.org) or directly at www.aaofoundation.net. If you should have any questions, please call Robert Hazel, AAOF EVP, at 800-424-2841, #ext. 546 (rhazel@aaortho.org), or me at your convenience.

Council on Insurance Report

Dr. Larsen R. Keso, SWSO Representative to COI

The Council on Insurance met in St Louis 25 June 2011. Representatives from AAOIC, New Your Life Insurance Company (NYLIC) and Affinity Insurance Services (AIS), AAO broker/marketer presented status reports.

Due to favorable loss ratios, Affinity presented a dividend proposal from Hartford for policy-holders in the BOP, Workman's Comp or Business Umbrella covers.

The Disability Income plans continue to be a source of concern. Ongoing efforts to obtain reinsurance have been unsuccessful.

AAOIC reports the broker is taking action to identify why recent grads may not be purchasing the AAOIC professional liability policy.

The current Cost Stabilization Reserve and Dividend on Deposit accounts have favorable balances. New York life has suggested a 10% of premium discount for the Yearly Renewal Term, Accidental Death and Disability, Long Term Disability and Professional Office plans.

After review of the major medical plans, Council proposed and NYLIC approved premium increases ranging from 0 to 12% for the several traditional and HSA plans.

Pursuant to a request from Council, Affinity presented findings for obtaining a Cyber Liability policy. This project has received AAO Trustee approval to proceed.

The AAO BOT has also approved a COI recommendation to ask COOP to develop a program to create member awareness of the risks inherent to digital records.

Personal Note:

This year is the first of my fourth and final two-year term. COI is perhaps unique in that there is a very long learning curve to achieve proficiency. Any active member with experience in or of the insurance industry and interest in serving our membership in a valuable role should contact SWSO officers or Trustee Gayle Glenn.

ANNOUNCEMENTS

ABO awards O.B. Vaughan Special Recognition Award to Dr. Walter J. (Bud) Belanger

The American Board of Orthodontics (ABO) awarded Dr. Walter J. (Bud) Belanger the O.B. Vaughan Special Recognition Award of The American Board of Orthodontics Saturday, May 14 at the annual luncheon of the College of Diplomates of the American Board of Orthodontics, which was held in conjunction with the 2011 Annual Session of the American Association of Orthodontists in Chicago, Ill. As of 2011, the Special

Recognition Award of The American Board of Orthodontics has been renamed the O.B. Vaughan Special Recognition Award of The American Board of Orthodontics in honor of Dr. O.B. Vaughan, an ABO past president. The ABO established this award to acknowledge those who have made a significant contribution to the orthodontic specialty.

“Dr. Vaughan is an icon in the specialty of orthodontics, and his selfless service as both an examiner for the ABO Clinical Examination and an educator is evidence of his dedication to excellence in the orthodontic specialty. This newly named award reflects the ABO’s appreciation for all that he has done over the years,” said Dr. Jeryl English, the 2010-11 president of the ABO. “We are also pleased to give this award to Dr. Belanger. Dr. Belanger, a longtime clinical associate professor at The University of Texas Dental Branch at Houston (UTDB), has taught residents his ‘Golden Rule,’ which is to treat every patient the way you would want to be treated. He has stressed board certification throughout his career. Bud loves the orthodontic specialty, but also stresses family, faith and friends for a successful life.”

Dr. Vaughan, a Diplomate of the ABO, served as president of the ABO from 1987 to 1988 and has been an ABO examiner since 1980. Dr. Vaughan served as an associate clinical professor in the graduate orthodontic program at UTDB and is currently serving in the same capacity in the graduate orthodontic program at The University of Texas at San Antonio. Dr. Vaughan has received the Albert H. Ketcham Memorial Award and the Martin E. Dewey Memorial Award. He has been recognized as the Outstanding Alumnus by Saint Louis University and also by the University of Missouri–Kansas City Orthodontic Department. Dr. Vaughan is also a Diplomate of the American Board of Periodontology. Dr. Vaughan practices orthodontics in Corpus Christi, Alice and Beeville, Texas.

“I am highly honored, and I am also extremely pleased to receive this honor from The American Board of Orthodontics,” Dr. Vaughan said. “It is very gratifying to receive this honor from my fellow Texan and the head of Department of Orthodontics at The University of Texas Dental Branch at Houston, Dr. Jeryl English. For some 40 years, I have known, taught and worked beside Dr. Belanger. The ABO could not find a finer professional gentleman and splendid orthodontist than Dr. Belanger to receive this award.”

Dr. Belanger is a clinical associate professor in the Department of Orthodontics at UTDB. Dr. Belanger graduated from and earned his DDS at UTDB. He returned to UTDB for specialty training in orthodontics; he received his certificate in orthodontics and his master’s degree in 1972. Dr. Belanger has taught in the Department of Orthodontics for 40 years and maintained a private practice in Pearland, Texas. He has served on 20 master’s thesis committees, and he served as president of the Texas Orthodontic Alumni Association in 2002 and The Orthodontic Foundation in 2003. In 1998, Dr. Belanger received the Yellen-Schoverling Award as the outstanding orthodontic alumnus from UTDB.

“I feel so humbled and blessed to have journeyed in the specialty of orthodontics,” Dr. Belanger said. “I have had the amazing opportunity to have been surrounded by many professional colleagues who were brilliant and passionate—true role models for me, like Dr. O.B. Vaughan. To receive an award like this, the first O.B. Vaughan Special Recognition Award from The American Board of Orthodontics, is genuinely a tremendous honor for me.”

Dr. Larry Tadlock elected to serve as a director of The American Board of Orthodontics

The American Association of Orthodontists (AAO) House of Delegates elected Dr. Larry Tadlock of Keller, Texas, to serve as a director of The American Board of Orthodontics (ABO) on Friday, May 13. The House of Delegates convened in conjunction with the 2011 Annual Session of the AAO in Chicago, Ill.

The ABO is the only orthodontic specialty board recognized by the American Dental Association (ADA) and sponsored by the AAO. Board certification is a process by which an individual orthodontist is voluntarily

examined by his/her peers as to orthodontic knowledge and clinical skills. The passage of the examination process is a demonstration to the dental profession and the general public of the orthodontist's pursuit of continued proficiency and excellence in orthodontics.

Each ABO director represents one of the eight constituent organizations of the AAO and serves an eight-year term, which culminates in the position of the president. The ABO directors are responsible for establishing policy with regard to the board certification of specialists in orthodontics. During his tenure as an ABO director, Dr. Tadlock will represent the Southwestern Society of Orthodontists (SWSO). He replaces Dr. Jeryl English of Houston, Texas, who is the immediate past president of the ABO.

“I have been a strong, outspoken advocate of the ABO and its mission for many years,” Dr. Tadlock said. “I believe that ABO directors serve the profession in a selfless fashion with little regard to the time, energy or personal costs required. I can’t imagine a greater professional responsibility than to serve as an ABO director, and it is an indescribable honor to have been selected.”

Dr. Tadlock earned his DDS from the Baylor College of Dentistry in 1984 and earned his orthodontic certificate and master’s degree from The University of Texas Dental Branch at Houston (UTDB) in 1988. Dr. Tadlock has maintained a private orthodontic practice in the Keller area since 1988. He is a member of Angle Southwest, a component of the Edward H. Angle Society of Orthodontists; the AAO; the SWSO; and the Texas Association of Orthodontists, among many other organizations. He is a fellow of the American College of Dentists; a Diplomate of the ABO; a member of the College of Diplomates of the American Board of Orthodontists (CDABO); and a member of the Texas Orthodontic Study Club, formerly known as the Tweed Orthodontic Study Group of Texas. He is a past president of the SWSO and the UTDB Orthodontic Alumni Association. He has received numerous awards for his contributions to the orthodontic specialty, including the 2009 Yellen-Schoverling Award from the UTDB Orthodontic Alumni Association, the 2008 Earl E. and Wilma S. Shepard Award of Distinguished Service from the ABO, the 2004 Tom M. Matthews Award from the Baylor Orthodontic Alumni Association, the 2003 Service Appreciation Award from CDABO, and the 2003 and 2002 Robert E. Gaylord Award of Excellence in Orthodontic Education from the Baylor College of Dentistry, along with several other awards from the Baylor Orthodontic Alumni Association and the Tweed Orthodontic Study Group of Texas.

Dr. Jeryl English concludes term as president of The American Board of Orthodontics

Dr. Jeryl English of Houston, Texas, has completed his term as president of The American Board of Orthodontics (ABO). The ABO installed Dr. Barry Briss of Boston, Mass., as president; Dr. Scott Jamieson of Marquette, Mich., as president-elect; and Dr. Marvin Kastrop of Billings, Mont., as secretary/treasurer May 17 during the ABO President’s Dinner. This event was held in conjunction with the 2011 Annual Session of the American Association of Orthodontists (AAO) in Chicago, Ill.

During his tenure as an ABO director, Dr. English has represented the Southwestern Society of Orthodontists (SWSO). He has been a Diplomate of the ABO since 1985, and is a member of the College of Diplomates of the American Board of Orthodontics.

Dr. English obtained his dental education at the University of Missouri–Kansas City (UMKC), receiving his DDS in 1971. Dr. English joined the U.S. Army Dental Corps, and, after serving for three years, he returned to UMKC for residency training in orthodontics. He earned a master’s degree in oral biology and a certificate in orthodontics in 1976. Dr. English then went on to have a distinguished career in the U.S. Army Dental Corps where he served for 24 years. He served 12 years in command positions throughout the United States, Europe and the Middle East. In 1990-91, Dr. English was the commander of the 2nd Medical Detachment and was responsible for command and control of U.S. Army dental personnel in the theater of operation of Operation Desert Storm in Saudi Arabia.

Dr. English retired from the U.S. Army Dental Corps in 1995 with the rank of colonel and received his second Legion of Merit Award. After retirement, he joined the faculty of the Baylor College of Dentistry. He was both clinic director and the graduate program director in the Department of Orthodontics. In September 2001, Dr. English accepted the position of chairman and program director of the Orthodontic Department at The University of Texas Dental Branch at Houston (UTDB). He is a professor with tenure at UTDB. Dr. English has published 92 abstracts, 101 refereed articles, six book chapters and an orthodontic textbook published by Elsevier entitled, *Mosby's Orthodontic Review*.

In addition to his service with the ABO, Dr. English serves as an ad hoc reviewer to both *The Angle Orthodontist* and the *American Journal of Orthodontics and Dentofacial Orthopedics*. He also served on both the AAO Council on Scientific Affairs and the AAO Council on Orthodontic Education. He recently concluded a five-year appointment on the American Dental Association Test Construction Committee for Part II of the National Board Examination, as well as a six-year term as an orthodontic specialty site visitor for the Commission on Dental Accreditation. He was the 2006 Yellen-Schoverling Award recipient from the UTDB Orthodontic Alumni Association. In March 2007, he was presented with the UMKC Orthodontic Alumnus of the Year Award.

Dr. English stated the following in regard to his eight years of service to the ABO: "I want to express my deepest appreciation to all of the ABO directors with whom I have had the extreme pleasure to serve. All are superb individuals with multiple talents. The burden and trust placed on an ABO director are immense. Our challenges are difficult as we try to encourage board certification yet maintain the standards of clinical excellence that are the legacy of the Board. The ABO includes eight directors and seven staff with multiple responsibilities.

"The past eight years in the ABO have seen some of the most extensive changes our organization has ever known. We have modified our exam process to accommodate Gateway Diplomates and started the Initial Certification Examination and banking of cases for a new generation of orthodontists and, yet, maintained the high level of patient care that the ABO certification signifies. We have entered the age of technology, keeping pace with the digital era, and our new center demonstrates state-of-the-art technology. The highlight of my tenure on The American Board of Orthodontics was the historic renovation of our ABO office and the construction of the new Clinical Exam Center, with a ribbon-cutting ceremony on Nov. 17, 2010.

"My wife, Kathy, and I have thoroughly enjoyed our service on the ABO. As our eight-year journey on the Board comes to an end, we part with intense emotional feelings for our many friends."

About the ABO

The ABO, founded in 1929, was the first specialty board in dentistry. The primary purpose of the ABO is to elevate the level of orthodontic care for the public by encouraging excellence in clinical practice and specialty education. In its mission statement, the ABO clearly defines four objectives: 1) to evaluate the knowledge and clinical skills of graduates of accredited orthodontic programs by conducting exams and conferring time-limited certificates; 2) to reevaluate clinical knowledge and skills through administration of recertification exams throughout a Diplomate's career; 3) to support the development of quality graduate, postgraduate and continuing-education programs in orthodontics; and 4) to promote and encourage certification expertise throughout the world.

ALOHA! SAVE THE DATE: May 5-8, 2012

**American Association of Orthodontists
112th Annual Session**

Honolulu, Hawaii, USA

Catch the Aloha Spirit

Create remarkable memories by attending one of the premier orthodontic meetings in the world in 2012 when the AAO Annual Session returns to our 50th state. The island of Oahu, the exciting city of Honolulu and the sugary white beaches of Waikiki will serve as the backdrop as the AAO goes Hawaiian. The 2012 meeting will be one that doctors, spouses, staff and family will not want to miss.

Education (Doctors)

- Much-anticipated lectures by named speakers:
 - *The John Valentine Mershon Lecture* by **Dr. Tom Mulligan**;
 - *The Jacob A. Salzmann Lecture* by **Dr. Sheldon Baumrind**;
 - *The Edward Hartley Angle Lecture* by **Dr. Don Joondeph**.
- There will be more than 160 Doctors Scientific Program lecturers from around the world:
 - Case presentations from world-wide, with strong representation from the Pacific Rim
 - “Kaleidoscope of Experience” lecture series
 - Practice fundamentals
 - Hot topics—TADs, imaging, TMD/occlusion and more
 - Class II & Class III treatments and stability
 - Problem-solving and the unique clinical encounter.
- Two-day post-conference sessions at four different locations with programs by well-known orthodontic speakers, with a total 6 CE credits available via post-conference participation!

“The 2012 Annual Session lecture schedule will be abbreviated to enable everyone to enjoy Hawaii. We will start early every morning and finish early. How good is that!” - *Dr. Leslie Will, 2012 Annual Session Program Co-Chair*

Education (Orthodontic Staff)

- Staff lecture topics will include office safety/OSHA compliance, efficient scheduling, communications, clinical judgment, patient documentation quality, social networking/technology and many more.
- The always-popular Trapezio hands-on lecture/laboratory sequence will also be offered.
- How to work BIG in a small economy.
- FOR THE RECORD: What quality is your patient documentation?

“Doctor, be a hero to your staff, help boost morale and productivity, and incentivize your team. Bring them to Hawaii!”- *Dr. Steve Tinsworth, 2012 Annual Session Orthodontic Staff Program Co-Chair*

“Let us show your staff that OSHA is not a Hawaiian fish.”- *Dr. Mark Johnston, 2012 Orthodontic Staff Program Co-Chair*

Unforgettable Events

- Opening Ceremonies at the iconic Waikiki Shell amphitheatre, with music by the Doobie Brothers
- Excellence in Orthodontics Awards Ceremony address by Captain Chesley "Sully" Sullenberger III, pilot of the US Airways plane that was forced to land in the Hudson River
- Beach Gala featuring local entertainment and different Hawaiian food stations
- Special International Reception at a beautiful location
- Featured Speakers program open to all attendees, designed to motivate, inspire, and enlighten.

“Hawaii offers a family-oriented, kid-friendly environment with unlimited opportunities for fun, learning and relaxation for the entire family. Please bring your sun block.” -*Dr. Lili Horton, 2012 Annual Session Local*

Arrangements Chair

Creature Comforts

- The breathtaking Hawaii Convention Center (HCC) is an architectural masterpiece, showcasing an open-air, natural environment that makes you forget you are indoors.
- The beautiful beachfront Hilton Hawaiian Village will be our headquarters hotel.
- The Waikiki Beach area is conveniently located to hotels and HCC for easy access to shopping, dining and local entertainment.
- Complete program, lecture locations and times will be accessible via your smart phone for a paperless convention.

ANNUAL SESSION 2012 POST-CONFERENCES

Experience more of what Hawaii offers during four post-Annual Session conferences at four locations on three different Hawaiian islands. Each conference will offer 4 hours of CE credit per day (for a total of 8 CE credits) with lectures by high-profile presenters. Visit AAOinfo.org for more details.

Schedule

Wednesday, May 9 – Thursday, May 10, 2012, with lectures from 8 am-12 pm daily

Island Locations

Maui

- Sheraton Maui Resort & Spa, Kaanapali or 2) Grand Wailea Resort: Attend a post-conference on Maui. Enjoy the scenic, coastal Hāna Highway, the Haleakalā National Park with its dormant volcano, and the Lahaina district with its shops, restaurants and whale-watching opportunities.

Kauai

- St. Regis Princeville Resort: Attend the post-conference on Kauai, filled with natural wonders and filming sites of scenes in numerous movies including *South Pacific*, *Jurassic Park*, *Raiders of the Lost Ark*, *Pirates of the Caribbean: On Stranger Tides*, the 2005 remake of *King Kong* and the 1961 Elvis Presley film, *Blue Hawaii*.

Oahu

- Turtle Bay Resort, North Shore: Remain on Oahu after Annual Session, but leave Honolulu for a secluded resort on the island's North Shore that offers a wealth of outdoor recreation.

“Of course this is only anecdotal, but many visitors to Hawaii seem to find it habit-forming.” - *Dr. James Vaden, 2012 Annual Session Doctors Scientific Program Co-Chair*

Notice of Member Deaths

The following SWSO members have passed away in the last 6 months: Stephen King, Kempner, TX, Richard Toupal, San Antonio, TX; Dan West, Sugar Land, TX; Alice T. Peak, Austin, TX; David G. Hurr, Baytown, TX; Vincent Michael Kelly, Jr., Tulsa, OK; and Peter J. Paulus, Ft. Worth. We extend our sincere condolences to the family and friends of these members.

If you have any announcements you wish to add to future newsletters, please contact the Editor of the SWSO Newsletter, Dr. Kirt Simmons, at SimmonsKE@archchildrens.org, or 501-868-2696.