



Council on New and Younger Members (CONYM)

Committee Name: Council on New and Younger Members

Committee Chair Name: Dr. Brandon Shoukri

Current Committee 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)

Fall 2021 Pulse Survey Recap:

- 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

CONYM Feedback

- 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

Areas of Focus Initiative

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.

Initiative #1: Practice Management

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:

- 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

Initiative #2: Practice Management

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:

- 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)

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/>.

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.)

Other initiative ideas related to clear aligners or all things digital:

CONYM discussed aligner education since it is often excluded from residency programs. It was suggested to offer scholarships for the Aligner Intensive Fellowship program.

AAO Connections:

- 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

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.

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.

New Orthodontist & Resident Conference at AAO Annual Session:

The 2022 New Orthodontist and Resident Conference at Annual Session is scheduled on Saturday, May 22, 11:30am-2:00pm in Miami, Florida.

- 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

CONYM Brainstorming:

The council discussed potential challenges and concerns of NYMs that AAO can address:

- 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:

- The following NYM council advisor appointments were identified for 2022-23:
- 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

An appointment still needs to be identified for COGA.

GORP/ASDA Meetings:

- 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.
- 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).

Annual Meeting

- The next meeting will take place in St. Louis, Missouri. The meeting date is to be determined.

Respectfully Submitted,

Brandon Shoukri, DDS, MS

GLAO Representative to the AAO Council on New and Younger Members