

THE GREENSHEET

FALL

Edited by Janet L. Carter, OD

2009

ARBO's 90th Annual Meeting a Rousing Success

The 90th Annual Meeting of ARBO took place from June 21st through the 23rd in the Gaylord Resort at National Harbor in Maryland (near Washington, D.C.). The attendees took part in the House of Delegates, various workshops, and listened to a number of informative presentations of interest to both board members and staff. There were 122 total in attendance, including 72 delegates from 37 member boards. You will find photographs of many of the highlights in this issue; we hope yours is among them!

The meeting commenced Sunday morning with the traditional workshop offered by the National Board of Examiners in Optometry. Drs. Jack Terry and Sandra Neustel of the NBEO staff presented information on the recently restructured examination; reviewed performance on recent administrations, and discussed ongoing issues of interest to both ARBO and the NBEO. There was a comprehensive



Dr. Christina Sorenson Presiding

discussion on changes in scoring that are to be adopted for the examination, and how it would affect the score reports that state boards receive.

Later in the morning there were breakout sessions for both board members and their administrative staff. Dale Atkinson, ARBO's Legal Counsel, presented a board member training. Mr. Atkinson discussed the legal and ethical responsibilities that board members take on when they are appointed. Howard Flippin, a past President of ARBO, presented a workshop on "Historical Concerns and Current Issues for Executive Directors and Administrators." Dale Atkinson continued over a buffet lunch with a presentation on evidentiary requirements in discipline cases and how these impact our member boards. Luncheon also afforded an opportunity



Presentation of 2008-2009 and 2009-2010 ARBO Board

for first time attendees to receive an orientation on meeting procedures and policies, and to network with each other.

The 90th Annual Meeting of the House of Delegates was officially called to order by President Christina Sorenson on Sunday afternoon. Attendees were treated to a rousing flag ceremony presented by members of the Armed Forces Color Guard. The afternoon business included reports from the President, the Executive Director, the Secretary-Treasurer, and approval of the 2008 Annual Meeting Minutes. Delegates also listened to reports from the Resolutions, Bylaws and Nominating Committees. Later in the afternoon there was an update on legal cases affecting regulatory boards from Dale Atkinson, and a report from the NBERC Committee (along with a response from the ARBO

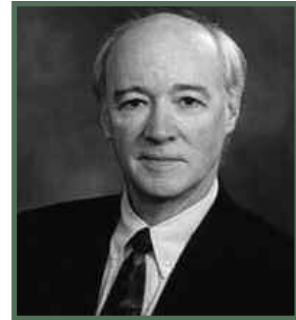
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LETTER FROM THE PRESIDENT



*Dr. William Rafferty is the
President of ARBO*

It is an honor to serve as the President of the Association of Regulatory Boards of Optometry. Dr. Sorenson is certainly a tough act to follow, but I will do my best to promote the issues that are of concern to our member boards, and to represent you in the coming year. This is a time of great change in health care and in our profession, and we all must be vigilant to insure that our mission of aiding our member boards in protecting the public is foremost in our minds as we move forward.

Thank you to all of you that attended our 90th Annual Meeting in the Washington, DC area. We had over 120 total attendees, including 72 delegates from 37 of our member jurisdictions. Many boards are severely hampered by travel and financial restrictions, so I greatly appreciate the efforts you made to join us for this important meeting. With many controversial issues being addressed by the House of Delegates this year, the Annual Meeting Planning Committee assembled leading experts in the field and the most current and relevant information to assist the House in making these key decisions that will impact the practice of optometry for years to come. Kudos go to the Committee, chaired by Dr. Donovan L. Crouch and to the ARBO staff for their tremendous efforts to make the meeting a success. We look forward to seeing all of you next year in Orlando Florida.

ARBO is facing an interesting and challenging year. Our organization, like many others, will need to "tighten our belts" some this year to face this challenging economy. Some of the cost-saving measures that your Board of Directors is considering include fewer face-to-face meetings of the Board and committees, as well as more reliance on electronic means of communication. In that spirit, this version of the Greensheet is again being sent via cyberspace. Please make sure that ARBO has the email addresses of all of your board members so that they can receive our newsletters. ARBO will also be looking at ways of increasing revenue. We know that some of our member boards are facing dire financial situations in their jurisdictions, and it is our goal to assist them as much as possible. Many of ARBO's programs can be utilized by your boards to fulfill your mandate more efficiently and inexpensively; please don't hesitate to contact the office if you need assistance to best do this.

As directed by the ARBO House of Delegates (see resolutions on page 5) our focus this year will be on developing methods and modalities for demonstrating maintenance of competence. During the meeting it became clear that maintenance of competence is a state licensing board responsibility. We must support our member boards and ensure they have the tools needed to fulfill their mission of maintenance of competence to protect the public. As such, we will continue to reinforce our current programs and as stated above develop additional methods for these critical activities. I welcome all of your comments and concerns regarding this issue.

Once again, thank you all for the opportunity to serve you as your President. Without a doubt, this will be a very busy year. I will do my best to move ARBO forward as an organization that does the right thing for the profession of Optometry and the public interest. I thank you in advance for all of your support in the coming year. If you have any questions or concerns about ARBO or any of our programs, please feel free to email me at president@arbo.org. You may also contact the ARBO office through our website, www.arbo.org. We would love to hear from you!

Sincerely,

A handwritten signature in black ink that reads "BILL" in a stylized, cursive font.

William B. Rafferty, OD
ARBO President

President's Profile

Dr. William B. Rafferty, North Carolina was elected to the office of President by the ARBO Board of Directors during the June 2009 ARBO Annual Meeting. Dr. Rafferty was initially elected to the ARBO Board of Directors in June of 2005, and during that time has served as Vice President and Secretary-Treasurer. Dr. Rafferty's long history of service to this organization dates back to 1992 when he served on the IAB's (ARBO's prior name) Continued Competence Assessment Committee. That same year this Committee formed the Council on Optometric Practitioner Education (COPE).

Dr. Rafferty is in his third term on the North Carolina State Board of Examiners in Optometry. He is a 1977 graduate of the UAB School of Optometry and currently serves as Assistant Professor of Ophthalmology in the Corneal and Refractive Surgery Service and as Director of Optometric Services at Duke University Eye Center in Durham, North Carolina.

A note from our Executive Director



Diane Nickolson is the Executive Director of ARBO

What a pleasure it was to see so many of you at our Annual Meeting in June. Having completed my second annual meeting with ARBO, it was especially fun to see people I had met last year in Seattle. It reminds me that we really do need to continue to focus more time and energy into communications with our member boards.

ARBO has implemented a number of new communications activities over the past few months. ARBO leaders and staff are visiting our member boards to talk about the benefits we can provide. We're visiting with two boards each month with a goal of meeting with every ARBO Member Board in person within the next two years. The GREENSheet has become mostly electronic to ensure a quicker delivery, and we are sending more frequent informational emails to our members, noting a limit of no more than one a week. Staff is working to ensure that every phone call is returned and email is replied to within one business day.

Attending your Board meetings has been an enriching experience for me personally. Having joined the ARBO team with no background with regulatory boards or issues, it's been an excellent learning activity. Not to mention being able to meet more of our members in person!

All of these activities have been identified to improve our communications and ensure you are well-informed of the ARBO programs and projects. We have lots more on the "to do" list in this regard ... but we are on our way with these changes. I'd love to hear your suggestions on new services we can implement and improvements we can make.

This issue of the GREENSheet introduces a new column from members of the ARBO Executive Directors/Administrators Committee. We are excited about this new addition and are looking forward to more of this type of sharing of information and concerns regularly in the GREENSheet and other vehicles.

I also want to note the 2009-2010 ARBO Committees are still being finalized. If you signed up for a committee and haven't heard yet ... you will soon! We will list the committee assignments in the next issue of the GREENSheet. The staff and I are excited to be working with all of the ARBO Committees over the next year. It promises to be another busy and productive year.

Thank you for all that you do for ARBO, the profession, and the public we serve.

News from our Member Board Executives

Member Board Executive Directors and Administrators attending the ARBO Annual Meeting in National Harbor, MD met for workshops intended to address specific topics encountered in the administration of optometry boards. Although the workshops are designed for ED/Administrators, many public and optometrist board members attended.

Corporate Optometry and the varied state regulations for corporate optometry were addressed during the first workshop session. Howard Flippin, O.D., Executive Director, Arkansas State Board of Optometry led a discussion on the history and current issues related to corporate optometry.

Changes in the evidentiary requirements in discipline cases for many states prompted the ED/Admin Committee to invite Dale Atkinson, Esq., Atkinson and Atkinson, to address the issue. Dale led the group through a discussion on the differing levels of evidence and their impact on Boards' ability to discipline.

David Swankin, Esq., President and CEO, Citizen Advocacy Center engaged the group in a discussion on Engaging Consumer Members as Active Participants. Mr. Swankin stressed the importance of consumer board member training and stated that in the summer of 2009, there would be an online training module available for new consumer Board members. Although targeted to consumer members, the online training or "tool kit" as David coined it, is appropriate for practitioner Board members as well. Some additional points of interest highlighted in his presentation are as follows:

- The average Board member spends 38 days in service
- The state of Pennsylvania has a law requiring Board member training
- The state of Florida had a 3 day Board member training
- Board Chairs/Presidents are responsible for full integration of consumer members
- Executive Directors and Administrators' role is essential and important in integrating consumer members.

Finally, the always-popular open forum "What's New In Your Jurisdiction?" generated dialogue and discussion about issues affecting Board operation generally, concerns specific to various jurisdictions, and the sharing of best practices.

The Executive Director/Administrator Committee will soon begin planning for next year's workshops and members want to get input from colleagues about topics of interest, relevance, and importance to that will assist in maintaining effective Board operations. Please contact any of the committee members with topics of interest or other suggestions.

*Patricia G. Bennett, MSW, Maryland
Laurie Mickelson, Minnesota*

Join ARBO in Welcoming Two New Board Members!



**Dr. Roger D. Pabst, OD
Minnesota**

During its 2009 annual meeting the ARBO House of Delegates elected Roger D. Pabst, O.D., of Redwood Falls, Minnesota to a seat on the ARBO Board of Directors. Dr. Pabst received his BA in Biology/Chemistry Education from Southwest Minnesota State University in 1971. He received his Doctorate of Optometry from Pacific University in 1975 and received his license to practice optometry in Minnesota, Oregon and Washington.

Dr. Pabst has been a member of the American Optometric Association and the Minnesota Optometric Association since 1975. He served as the AOA-PAC Chair from 1996-1997 and served as Chair of the Vision USA Committee from 2002-2005. Dr. Pabst was named Vision USA Doctor of the Year in 2003-2004 and Distinguished Minnesota Optometrist of the Year 2003-2004. He was first appointed to the Minnesota Board of Optometry in 2005 and is currently serving his second 4-year term.

Dr. Pabst is active in his local Chamber of Commerce, Lions Club and church. His spare time is spent cruising in his 1929 Ford Street Rod, 1969 Mustang Convertible, 1923 Ford T-Bucket or one of two early model Pontiac Fieros. When he gets tired of four wheels, he puts on his leathers and rides his 2003 Anniversary Special Harley-Davidson V-Rod. He is excited about the opportunity to again serve the profession he loves. Please know he is always open to your input to better serve ARBO.



**Dr. Susy Yu, OD, MBA, FFAO
California**

Dr. Susy Yu, currently Vice-President of the California Board of Optometry, has been elected by the ARBO House of Delegates to serve as an ARBO Board of Director. Dr. Yu is the Director of Business Strategy and Operations Support for Vision Essentials for Kaiser Permanente in Southern California. Previously, she was a Lead Optometrist for the Southern California Permanente Medical Group, Kaiser Permanente South Bay Medical Center.

Dr. Yu is a Fellow of the American Academy of Optometry. She earned a Bachelor of Arts degree from the University of California, Berkeley, Bachelor of Science and Doctor of Optometry degrees from the University of California, Berkeley School of Optometry, and a Masters in Business Administration degree from the Anderson School of Management at the University of California, Los Angeles.

Dr. Yu lives in San Pedro, California with her 3 year old daughter, Ilsa, and her husband Dr. Brian Kim. She enjoys photography and international travel in her spare time.

ARBO to Visit Member Boards

ARBO leaders and staff are planning to visit all of our Member Boards to learn about your activities and how ARBO can best support them as well as provide information on our current programs and services. We are making an effort to visit with two Boards each month with a goal of meeting with every ARBO Member Board in person within the next two years.

Already this year we have attended Board meetings in Illinois, Kansas, Maryland, New Mexico, New York, South Carolina, Tennessee and Wyoming to tell them more about ARBO's member benefits, programs and services. If you'd like to schedule a visit during one of your upcoming Board meetings, please contact Lisa Fennell, ARBO's Project Communications Specialist at lfennell@arbo.org or 704-970-2710.

2009 ARBO House of Delegates Resolutions

COPE Standards for Commercial Support Resolution

WHEREAS, all member boards require CE for maintenance of licensure; and
 WHEREAS, it is the intent of these requirements to maintain continued competence within their respective jurisdictions; and
 WHEREAS, the purpose of the continuing education system is to ensure the public welfare; and
 WHEREAS, COPE's mission is to accredit quality optometric continuing education on behalf of the member boards; and,
 WHEREAS, the Council on Optometric Practitioner Education "Standards for Commercial Support" have been accepted in the health care community; and,
 WHEREAS, industry support of continuing education has increased since the inception of COPE; and,
 WHEREAS, the benefits of industry support are well known however this support has created a conflict of interest that must be resolved to protect the integrity of COPE accredited CE; now therefore be it
 RESOLVED, the Association of Regulatory Boards of Optometry, at this 90th Annual Meeting, do wholeheartedly support the implementation of the Council on Optometric Practitioner Education "Standards for Commercial Support" to enhance optometric continuing education for the benefit of the public welfare.

American Board of Optometry Resolution

WHEREAS, the mission of the Association of Regulatory Boards of Optometry (ARBO) is to represent and assist member licensing agencies in regulating the practice of optometry for the public welfare; and
 WHEREAS, it is the responsibility of the regulatory boards, by statutory authority, to ensure continued competence of licensees within their jurisdictions; and
 WHEREAS, it is the responsibility of each healthcare profession to promote improve mechanisms of ensuring ongoing continued competence and maintenance of competence; now, therefore be it
 RESOLVED, that the Association of Regulatory Boards of Optometry, at this 90th Annual Meeting, recognize its responsibility to work with the profession and other stakeholders to establish an enhanced mechanism for maintenance of competence that truly protects the public we serve by setting acceptable standards in the formation, governance, requirements, and assessment; and be it further
 RESOLVED, that the Association of Regulatory Boards of Optometry, at this 90th Annual Meeting, will only support a mechanism that has adequate oversight from the regulatory boards of the optometric profession; and be it further
 RESOLVED, that the Association of Regulatory Boards of Optometry, at this 90th Annual Meeting, has equitable representation as does the American Optometric Association (AOA) on the American Board of Optometry (ABO) or any similarly created entity.

Continued Competence of the Optometric Profession Resolution

WHEREAS, the mission of the Association of Regulatory Boards of Optometry (ARBO) is to assist our member boards in the protection of the public; and
 WHEREAS, it is the duty of the regulatory boards to assure the public of the continued competence of our licensed professionals throughout their careers; and
 WHEREAS, all regulatory jurisdictions have in place a system of mandatory continuing education to insure continued competence; and
 WHEREAS, whereas recent indications from public advocacy groups, government agencies and profession-wide stakeholder groups have suggested that the current continuing education system is inadequate in proving this assurance; now, therefore be it
 RESOLVED, that the Association of Regulatory Boards of Optometry, at this 90th Annual Meeting, accepts these issues as valid and a call to action; and be it further
 RESOLVED, that the Association of Regulatory Boards of Optometry, at this 90th Annual Meeting, supports the development of an improved system of demonstrating continued competence for the benefit of the public; and be it further
 RESOLVED, that the Association of Regulatory Boards of Optometry, at this 90th Annual Meeting, acknowledges that this improved system could be utilized by a national program or individual jurisdictions to demonstrate maintenance of competence for the public welfare.

Mark Your Calendars for June 13-15, 2010!



Gaylord Palms Hotel and Convention Center in Orlando - Kissimmee, Florida will be the site of ARBO's 91st Annual Meeting.

ARBO's 91st Annual Meeting will be held in the magical area of Orlando, Florida

Sun-drenched and spectacular, Gaylord Palms Hotel and Convention Center brings excitement to life through world-class restaurants, dynamic on-site recreation, and breathtakingly beautiful gardens under glass. Its signature atriums, tropical and lush, recreate three Florida environments, immersing you in the sights and sounds that make the Sunshine State a top vacation destination. From the gently rising mists of the Everglades, to the funky and vibrant island revelry of Key West, to the Spanish-infused, old-world charm of St. Augustine, you'll delight in these unique Florida-themed settings.

The hotel itself was built in the sumptuous style and grandeur of a turn-of-the-century Florida mansion, but with the modern amenities and deluxe accommodations of a world-renowned luxury hotel.

Located just 1.5 miles from the front gate of Walt Disney World® and in close proximity to other Orlando theme parks, the Gaylord Palms Hotel is just 20 minutes from Orlando International airport.



ARBO's 2010 Annual Meeting
June 13-15, 2010
Gaylord Palms Hotel and Convention Center
Orlando-Kissimmee, Florida



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ARBO celebrated 90 years serving Member Boards at the 2009 Annual Meeting

representatives to the NBEO). The afternoon ended with a report from the Joint Board Certification Project Team representatives from ARBO, Drs. Christina Sorenson and Bill Rafferty.

The business of ARBO started again promptly Monday morning. Among the highlights was an address by David Swankin, President and CEO of the Citizen Advocacy Center, on assuring health practitioners competence. Later in the morning the attendees were addressed by Congressman John Boozman, OD (R-Arkansas), who presented his perspectives on the health care reform legislation being considered in the current Congress. We are always honored to have Dr. Boozman visit our ARBO meetings! The morning concluded with breakout sessions encompassing a panel of industry representatives (who discussed new technologies of interest to board members), and a presentation by David Swankin on how boards can engage consumer members as active participants in their agendas.

Monday afternoon the business of ARBO continued with numerous reports from various committees and organizations. The afternoon concluded with a lively discussion on the issue of Board Certification, and a vote on the issue was tabled until Tuesday morning. The President's Reception on Monday evening was a celebration of the 90th Anniversary of the ARBO Annual Meeting. Located adjacent to a stunning waterfall display in the atrium of the Gaylord Hotel, Dr. Sorenson offered a champagne toast to the rich history of this organization and to those who have contributed over the years.

On Tuesday the annual elections were concluded, and the various proposed resolutions again discussed. We have included more information on the final resolutions passed and the new board members elected elsewhere in this issue. Tuesday morning also featured breakout sessions for both optometrist board members (given as a COPE-Approved course sponsored by the Maryland Board of Optometry) and for Executive Directors and Administrators.

As you can see, this was a busy and exciting Annual Meeting. We strongly encourage you to begin making plans to attend our meeting in June of 2010 in Orlando, Florida. The meeting will take place June 13th through 15th at the Gaylord Palms Resort in Kissimmee. The Annual Meeting Committee is already planning the program to make it the best meeting yet! Mark your calendars now!

OE TRACKER Update

OE TRACKER FEE

ARBO recently began charging an annual fee of \$20 per optometrist for the use of the OE TRACKER continuing education tracking database. Upon paying this fee, O.D.s will receive complete access to their OE TRACKER account for 12 months, allowing them to review their CE attendance information electronically; reduce paperwork with online storage of CE certificates; and print CE certificates to use as proof of attendance. If they choose not to pay the fee, the optometrist will still have limited access to their OE TRACKER account.

OE TRACKER will continue to be free as a member benefit for ARBO's member boards to easily review the CE hours earned by their licensees and perform 100% audit electronically. As a result of inquiries from some of our member boards about paying the fee for their licensees, we are offering a 20% discount (discounted fee of \$15 per optometrist) to any of our member boards who want to pay for all of their licensees. If you choose not to, or are not in a position to take advantage of this discount, you may assign this benefit to your state association. This discount offer is good through December 31, 2010.

STATE ASSOCIATIONS PROVIDING OE TRACKER AS A MEMBER BENEFIT

The Georgia and Iowa Optometric Associations are working with ARBO to pay the fee for all their members to give them access to their OE TRACKER accounts for the next twelve months. By paying this fee, they are providing their members with an exciting new member benefit that will save them much of the time and paperwork involved in tracking and storing their continuing education credits for license renewal. Members of these Associations will receive complete access to their OE TRACKER accounts and will enjoy the security of knowing that their CE attendance information is stored permanently in the electronic database and can be accessed anytime.

GEORGIA LICENSING BOARD USING OE TRACKER TO AUDIT CE ATTENDANCE

The Georgia Board of Optometry requires its licensees to use OE TRACKER to store their continuing education attendance data. Licensees in the state of Georgia can view their CE course history by accessing their OE TRACKER account 24 hours a day and can review the number of hours they've earned to date. The Georgia Board of Optometry then uses OE TRACKER to verify the CE attendance of their licensees electronically. They are able to quickly audit 100% of their licensees by simply downloading a spreadsheet from OE TRACKER listing the CE hours earned by the optometrists licensed in the state of Georgia.



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OFFICERS

President - *William B. Rafferty, OD*
Vice President - *Jerry A. Richt, OD*
Secretary-Treasurer - *Michael W. Ohlson, OD*
Immediate Past President - *Christina M. Sorenson, OD*

DIRECTORS

Janet L. Carter, OD
Donovan L. Crouch, OD
Roger D. Pabst, OD
W. Ernest Schlabach, OD
Robert W. Smalling, OD
Susy Yu, OD

STAFF

Executive Director - *Diane L. Nickolson*
Bookkeeper - *Ron Cassell*
Project Communications Specialist - *Lisa Fennell*
Customer Service Representative - *Paul Harris*
Customer Service Representative - *Anita Matthews*
COPE Administrator - *Stacey Steelman*
Web Developer - *Sean Steger*

N B E O C a l l f o r N o m i n a t i o n s

One of the ARBO seats on the National Board of Optometry (NBEO) will be open in December of 2009. Dr. Donovan Crouch will be concluding his second term on the NBEO Board and is ineligible for re-election. In October the ARBO Board of Directors will be nominating at least three candidates from which the NBEO Board will elect Dr. Crouch's replacement. This call for action is an organizational request for potential candidates to nominate.

The NBEO is an established, non-profit corporation primarily engaged in testing and evaluation. The National Board has a full-time staff of eleven, utilizes over 750 people nationwide in support of its examination programs, and has an annual budget in excess of \$3.5 million.

As a Board Member of the NBEO, the member must have familiarity with the profession of optometry and knowledge of the mission and programs of the organization as well as the governing documents (e.g., articles of incorporation, bylaws) and policies and procedures. The NBEO Board Member term commitment is for four years, with this term beginning in December of 2009 through December of 2013.

In addition, the Board Member must be willing to:

- Serve as a member of any Board committees as appointed by the President and function as an active participation in discussions.
- Serve as a committee chair as appointed by the President.
- Attend ARBO Board of Director and Annual Meetings as required.
- Communicate regularly with Board members and the Executive Director.

To be eligible for nomination of an ARBO seat on the NBEO Board, the candidate must currently be a member of an ARBO Member Board in good standing, or have served within the preceding twelve months. Additionally, any current members of the ARBO Board of Directors are eligible for nomination. Since the NBEO examinations are only used within the United States, it is unlikely that a member outside of the US would be elected to the NBEO Board.

If you are interested in submitting your name to the ARBO Board for consideration and you meet the requirements listed, please send your C.V. and a letter of interest to Diane Nickolson, ARBO Executive Director at dnickolson@arbo.org by October 9, 2009.