ARBO Holds First Virtual Annual Meeting!

The ARBO House of Delegates met for an online virtual meeting on June 20, 2020. The Annual Meeting was attended by 92 individuals, which included 77 delegates from 38 member boards. The meeting was called to order by Dr. James Campbell, President. Dr. Campbell gave his President’s Report on the activities of the Board over the past year followed by a report by ARBO’s Executive Director, Ms. Lisa Fennell on the accomplishments of the staff. Next, Secretary-Treasurer Coby Ramsey presented the unaudited 2019 financial report and noted that the final auditor’s report would be distributed to the members once it has been completed. Then the minutes from the 2019 Annual Meeting were approved by acclamation.

Dr. Patrick O’Neill, Vice-President and Chair of the Finance Committee, reviewed the proposed ARBO 2021 Calendar Year Budget which was then approved. This was followed by the election for the Board of Directors where Drs. Patrick O’Neill and Coby Ramsey were both re-elected for a second four-year term on the Board. Dr. Campbell then presented the list of names to be submitted for the open position on the Accreditation Council on Optometric Education which was approved by the delegates.

Next, Dr. Larry Brown, Chair of the OE TRACKER Committee reported that there are now over 5 million attendance records in OE TRACKER and 96% of optometrists have CE data in their accounts.

The committee is promoting OE TRACKER as a tool to protect an optometrist’s license, which is one of their most valuable assets. They also encouraged the member boards to allow ARBO to assist with their CE audits using OE TRACKER.

Dr. James Campbell, Chair of the COPE Committee, reported that the committee had surveyed key speakers/instructors to ask for feedback on the COPE accreditation process and had developed a Q&A document in response to questions and concerns that were received. He added that the committee reviewed all the COPE categories in an effort to modernize them. They have come up with recommendations to combine some categories and to eliminate one category. He noted that a full proposal will be sent out to all member boards for feedback before changes are made. Dr. Campbell also reported that, due to COVID-19, COPE made a temporary policy modification to allow courses to be given in an interactive distance learning format and count as live COPE credit. He encouraged all member boards that
A Letter from the President

No one needs to tell you that these are unprecedented times in our world. The dramatic shutdowns of our day-to-day institutions, the social requirements of masking and distancing. These are times of uncertainty, frustration, fear and anger. Times of change and adaptation both temporary and permanent. Times to be thoughtful and flexible. Times to compromise and times to hold the course.

As regulators, our mission is clear. We are bound by our government mandates to protect the public we serve. In this time of flux and confusion, we need to be especially on-guard and keep our eye on that mission. We must be secure in the knowledge that our actions on the board cannot compromise public safety. I suspect you already know that, so why am I bringing it up?

In the time of COVID, we will run into issues that may request a change of our board’s normal policies or procedures. While most of these requests will seem reasonable, be sure to take a 10,000-foot view and not forget your board’s mission to protect the public you serve. The public being defined as those patients of the doctors licensed in your state or province. Following this definition requires a careful assessment of the hat you wear. Remember, if you are an optometrist on your board you are a public member with optometric expertise, but a public member nonetheless.

We will need to address tele-optometry, reciprocity and inter-state licensing. We knew this was coming, but COVID has pushed these issue into the forefront of our agendas. Frankly, many of these changes will allow for greater and more accessible care for the public and will help to define the future of healthcare. ARBO will help as a central resource for what other boards are doing in this regard. Our combined ideas and models will help craft a comprehensive plan to most efficiently address these issues.

We’ve written this before but deserves repeating; along with education and forum opportunities, ARBO provides your board with the three most important tools for licensing.

ARBO’s partnership with the National Board of Examiners in Optometry (NBEO)

There is nothing more critical in a boards decision to grant a new license than to have an accurate measure of entry-to-practice competency. The National Board of Examiners in Optometry has been the gold standard in measuring that competency for nearly 70 years. The National Board Exams (NBE) are constantly evolving to stay abreast of a changing profession. The NBEs are also vetted annually for integrity, validity and reliability. NBEO uses the highest psychometric standards in its exams so that our state and provincial boards can be confident in the results. Testing content, policies, procedures, locations, test givers and standard patients all factor into a very specific matrix of high stakes examinations. A change to any part of the matrix has the potential to reduce the integrity of the results. All changes to the exam must go through an extensive psychometric analysis before they can be incorporated into the exam process. Part of ARBO’s job is to ensure that the testing requirements for licensure are valid, unbiased, defensible and dependable. This allows your board to have the confidence needed to issue licenses to candidates that have successfully passed all three parts of the NBEO exams.

ARBO’s Council on Optometric Practitioner Education (COPE) program remains the gold standard for optometric continuing education requirements. The COPE program has been vetted and deemed substantially equivalent with medicine and other health care professions and is included in the Joint Accreditation for the Interprofessional Continuing Education collaborative. Like the NBE, your board can rely on the COPE program to accredit education needed for continued licensure.

Another time and cost saving for your board is ARBO’s OE (Optometric Education) TRACKER program. OE TRACKER simplifies the task of monitoring your licensee’s continuing education hours, and allows for a 100% audit of your licensees to guarantee compliance with your state or province requirements.

ARBO will always work to ensure that all of our programs will not only have the integrity you need to fulfill your public responsibility, but will also save your board time and money. We will be a resource to educate your members about the duties and responsibilities when wearing a regulatory hat. We will provide the tools you need for new and continued licensure.

In the time of COVID, the safety of everyone is a concern, but the safety of the public we serve is our mission and our priority. Always be aware of your duties and your mission. ARBO will always be available for your questions, concerns or feedback.

Stay well, stay safe.

Patrick W. O’Neill, OD, FAAO
President ARBO
A Note from the Executive Director

I hope you are all doing well. 2020 has certainly been a challenging year for all of us. Our staff started working from home back in March as many of you did. We’re very lucky that we are able to do work remotely and still meet the needs of our members and customers. I want to thank my team for all their hard work during this difficult time. I definitely miss seeing my staff in person and I really missed our face-to-face annual meeting in June. That’s the one event that I most look forward to every year and it was heartbreaking to have to cancel it. However, everyone’s health and safety is our top priority, so we pivoted like everyone else and changed the meeting to a virtual one. I thought our virtual meeting was a great success. We had 77 delegates from 38 jurisdictions join us this year and the silver lining in the cloud was that we had some new attendees that wouldn’t have been able to come if we had met in person.

Over the past eight months our staff has been kept very busy with all the online CE activities that are taking place. COPE has extended the rules modification to allow interactive online CE be given live credit, and OE TRACKER has proven to be a valuable tool for recording and tracking all the CE hours that are taking place. We’ve been holding monthly meetings with our Member Board Executives to check in with each other, share ideas, and see what changes other jurisdictions are making in response to COVID-19.

Your Board of Directors has also continued to work virtually. As we begin to look forward to 2021, the Board is planning to do some strategic planning to chart our course for the future. We’re also starting to plan our next annual meeting. We’re remaining optimistic and hoping that we’ll be able to meet in person. Our meeting is taking place in Newport Beach, California in June 2021 and I can’t imagine a better place to spend a few days after being at home for so long. I know you will all agree with me when you see it!

As always, please let me know if there’s anything I, or ARBO, can do to support you and assist you in doing your job as efficiently as possible. I hope you have a joyful holiday season. Stay safe and be well!

2020-2021 ARBO Officers Elected

After the 2020 Annual Meeting the ARBO Board elected new officers for the 2020-2021 term. The new officers are:

- **President:** Patrick O’Neill, OD, FAAO
- **Vice President:** Coby Ramsey, OD
- **Secretary-Treasurer:** Jeffery Yunker, OD
- **Immediate Past President:** James Campbell, OD

The other members of the ARBO Board this year are:

**Directors**-
- Patricia Bennett, MSW
- Thomas Bobst, OD, FAAO
- Steven Odekirk, OD
- Richard Orgain, OD

**Participants**-
- Donovan Crouch, OD, Consultant

ARBO Annual Meeting Recap (continued)

currently limit the number of online hours their licensees can obtain to consider making a similar modification.

Dr. Patrick O’Neill, Chair of the National Board Exam Review Committee, reviewed the committee’s report and recommendations regarding the NBEO exams. Dr. O’Neill reported that NBERC found all parts of the exam content to be consistent with the scope-of-practice of the member boards. Dr. O’Neill also reported that NBERC received an update on NBEO’s revisions to the Part III Clinical Skills Examination (CSE) which will change it from a procedure skills test to focus more on clinical decision making. NBEO has established a Task Force to begin development on the new Part III exam and they will be providing regular updates to ARBO’s member boards throughout the process.

Dr. O’Neill then discussed the NBEO policy change to limit the number of times a candidate may take any NBEO exam to six. Those who fail six times may appeal by petitioning either a State Board or an accredited academic program to be a sponsor which may allow the candidate to re-take the Exam. Dr. O’Neill noted that while NBERC agrees with the decision to limit the number of attempts, they feel that allowing a state or provincial board to sponsor a candidate who has failed the exam, puts the board in an unmanageable conflict of interest. NBERC recommends revising the policy to not include state or provincial boards as candidate sponsors. A poll was conducted and the results were 93% in favor of asking NBEO to revise the appeal policy and 7% against asking NBEO to revise the policy. Dr. O’Neill advised that ARBO would draft a letter to NBEO asking them to revise the appeal policy.

Next, Dale Atkinson, Esq. conducted Board Member/Regulator Training. This was followed by an open discussion of contemporary issues. Some of the topics discussed were: board policy/rule changes as a result of COVID-19; temporary/provisional licensure; telehealth rules/regulations; new CE requirements (i.e. cultural training, child abuse, etc.); updated laws/regulations on prescribing; efficacy of live vs. online learning.

The House of Delegates entered into Executive Session to discuss confidential issues related to the Association. A discussion of future Annual Meeting locations followed the Executive Session where Dr. Campbell asked the delegates to provide feedback on continuing to hold the Annual Meeting before the AOA meeting in the same location (see p. 7 for more information). Dr. Campbell thanked the members for their feedback and reported that future ARBO Annual Meetings will continue to be held in June in a location near the AOA meeting. Dr. Campbell then thanked everyone for attending and the meeting was adjourned.

Dr. O’Neill asked the members if they agreed with NBERC’s recommendation and whether they would like ARBO to ask NBEO to revise the policy to not include state or provincial boards as candidate sponsors.
Start Making Plans for ARBO’s 2021 Annual Meeting!

Mark Your Calendars for June 20-22 to attend the 2021 ARBO Annual Meeting!

ARBO’s 2021 Annual Meeting will be held at the Hyatt Regency, Newport Beach, California. The Hyatt Regency Newport Beach is a hotel retreat adjacent to the Upper Newport Bay Nature Reserve. Nestled among 26 acres featuring hundreds of palms and a succulent courtyard that is a nod to the California desert. The hotel is just 30 minutes from the Anaheim Convention Center and Disneyland. With three unique pools, an executive golf course and luxury shopping, this is a destination you won’t want to miss!

We look forward to seeing you in Southern California!

More information and online registration will be available in early 2021.
# ARBO 2020-2021 Committee Members

## Executive Committee
- Patrick O’Neill, OD, President
- Coby Ramsey, OD, Vice President
- Jeffery Yunker, OD, Secretary-Treasurer
- James Campbell, OD, Immediate Past President
- Lisa Fennell, Staff

## Finance Committee
- Coby Ramsey, OD, Chair
- Jeffery Yunker, OD
- Patrick O’Neill, OD, FAAO, Ex-Officio
- Ron Cassel, CPB, Staff
- Lisa Fennell, Staff

## Annual Meeting Planning Committee
- Donovan Crouch, OD, Chair
- Patricia Bennett, MSW
- Tom Bobst, OD, FAAO
- Steve Odekirk, OD
- Richard Orgain, OD
- Coby Ramsey, OD
- Jeffery Yunker, OD
- Patrick O’Neill, OD, FAAO, Ex-Officio
- Donna DeLay, Staff
- Lisa Fennell, Staff

## Industry Relations Committee
- Donovan Crouch, OD, Chair
- Patrick O’Neill, OD, FAAO, Ex-Officio
- Ron Cassel, CPB, Staff
- Lisa Fennell, Staff

## Judicial Council/Resolutions Comm.
- Kenneth Lawenda, OD (VT), Chair
- Larry Brown, OD (GA)
- Randall Forbes, Esq., (KS)
- Terri Haley, OD, (ID)
- Tom Bobst, OD, FAAO, Board Liaison
- Patrick O’Neill, OD, FAAO, Ex-Officio
- Lisa Fennell, Staff

## COPE Governing Committee
- Susy Yu, OD, MBA, FAAO, Chair (ARBO)
- Brett Bence, OD (AAO)
- J. Bart Campbell, OD, FAAO (AAO)
- James Campbell, OD (ARBO)
- Gary Chu, OD, MPH, FAAO (ASCO)
- Luanne Chubb, OD, FAAO (ARBO)
- Blair Lonsberry, OD, MS, Med, FAAO (AAO)
- Richard Madonna, OD, MA, FAAO (ASCO)
- Steve Odekirk, OD (ARBO)
- Caroline Pate, OD, FAAO (ARBO)
- Robert Smalling, OD (ARBO)
- Jeffery Yunker, OD (ARBO)
- Patrick O’Neill, OD, FAAO Ex-Officio
- Donna DeLay, Staff
- Lisa Fennell, Staff
- Sierra Powell, Staff

## Member Board Executive Committee
- Emily Cronbaugh (WY), Co-Chair
- Margaret Whelan (AZ), Co-Chair
- Shelley Sneed (OR)
- Jan Murray, (KS)
- Caren Jenkins, Esq. (NV)
- Patricia Bennett, MSW, Board Liaison
- Patrick O’Neill, OD, FAAO, Ex-Officio
- Lisa Fennell, Staff
ARBO 2020-2021 Committee Members

**National Board Examination Review Committee**

Patrick O’Neill, OD, FAAO, Chair  
Lillian Wang, OD (CA)  
Terri Haley, OD (ID)  
Ron Hopping, OD (TX)  
Steve Odekirk, OD (WV)  
Brad Cross, OD (AK)  
Marcus Kelley, OD (MT)  
Lisa Wallace-Davis, OD (VA)  
Ron Cassel, CPB, Staff

**OE TRACKER Committee**

Larry Brown, OD (GA), Chair  
Eric Bailey, OD (MN)  
Terri Haley, OD (ID)  
Caren Jenkins, Esq. (NV)  
Kenneth Lawenda, OD (VT)  
Jan Murray (KS)  
Tom Nadeau, OD (ME)  
Rebecca Sparks Dougherty, OD (KS)  
Patricia Bennett, MSW, Board Liaison  
Patrick O’Neill, OD, FAAO, Ex-Officio  
Lisa Fennell, Staff

**Nominating Committee**

To be established in early 2021.

Poll on Future Annual Meeting Dates and Locations

At the 2020 Annual Meeting there was a discussion with the members about the timing and location for ARBO’s future meetings. A poll was conducted with the following questions and responses.

1) **Would you like to continue to have future ARBO Annual Meetings in June before the AOA Meeting?**

   YES: 68%  
   NO: 32%

2) **Would you prefer to have future ARBO Annual Meetings at a different time of year?**

   YES: 24%  
   NO: 76%

3) **Would you like to continue to have future ARBO Annual Meetings in a location near the AOA Meeting?**

   YES: 72%  
   NO: 28%

4) **Would you prefer to have future ARBO Annual Meetings in a different location determined by ARBO unrelated to the location of the AOA meeting?**

   YES: 32%  
   NO: 68%
NBEO Part III Restructure

Part III Restructure: A Summary of Actions and Next Steps

NBEO has made significant progress on the Part III restructure. This restructure functionally began in the spring of 2019 and is currently in the final, and likely most lengthy, phase of development – pilot testing. The restructure began with a phase of intense research to understand best practices in performance testing from other similar assessment organizations. Strategic partnerships were formed to help streamline the development process and ensure a high-quality exam consistent with industry standards. The next step was the creation and distribution of the stakeholder survey which was sent to ARBO and ASCO constituents. The purpose of this survey was to identify the skills which stakeholders felt were most essential to the safe and effective practice of optometry. This was necessary knowledge as the new Part III exam focuses on clinical analysis and decision-making rather than the performance of psychomotor skills. Next, an open call for applications for the restructure task force was made through ARBO and ASCO and the information was posted on the NBEO website. A diverse 12-member task force comprised of optometrists from a wide variety of practice settings was convened to begin working toward the development of the exam blueprint and model. A wide variety of assessment tools and options were carefully and extensively investigated when developing the blueprint and model, including the potential use of technological advances, such as simulation.

A focused job task analysis created the opportunity for the optometric community to provide input on the restructure. One important function of the job task analysis was to ensure alignment between the exam blueprint and the realities of contemporary optometric practice. The job task analysis helped establish target ranges for the weighting of the exam content by assigning percentage weights to broad groups of knowledge, skills, and abilities. The results of the job task analysis were discussed and analyzed by the task force and internal staff and common themes were identified. Ultimately these themes were woven into the model and blueprint. The blueprint and model were released in the summer of 2020 through written communications to stakeholders in addition to being posted on the NBEO website (www.optometry.org).

The new Part III exam has been named the Patient Encounters and Performance Skills (PEPS) exam as a reflection of its two major components. The PEPS exam is a 12-station exam with ten stations being centered on patient scenarios and two stations being skills-based. Candidates will interact with standardized patients at every station, regardless of the focus of the station. To support the operationalization of this new exam and format, two new committees have been formed—the scenario development committee and the exam development committee—which will generate recommendations for the more granular aspects of the structure and content of the exam. Pilot testing addresses another aspect of the implementation of the exam by identifying methods to translate a theoretical design into a living exam. Pilot testing for PEPS began in September and will continue until the functionality and validity of all aspects of the exam has been confirmed. The NBEO will continue to keep ARBO and its constituent members informed as pilot testing continues and plans are made for exam implementation.
ARBO Offers CE Auditing Service for Member Boards

ARBO has a benefit for member boards that may be especially helpful during these difficult times: CE auditing services using OE TRACKER. Member boards have been able to utilize various auditing reports generated from OE TRACKER for many years. Now, ARBO is going a step further and will complete the audit process for you. This comes after numerous member boards have shown increasing interest in completing more extensive audits, but have expressed concern about internal resources and the time it takes to complete an audit.

Included in ARBO’s auditing services are a verification of jurisdictional CE requirements and review of the CE hours earned by each licensee/registrant to determine if the requirements for license renewal are met. ARBO is also able to send deficiency notices to licensees/registrants that are not in compliance, if desired. Member boards who are already utilizing ARBO’s auditing services include the Tennessee Board of Optometry and College of Optometrists of Ontario.

In order to for ARBO to complete an audit, member boards will need to:

1. Require their licensees/registrants to enter CE credits into OE TRACKER to ensure that all CE data is complete.
2. Encourage CE providers in their jurisdiction to report CE attendance to OE TRACKER to decrease the need for licensees/registrants to send their CE certificates to ARBO.
3. Send a list of current licensees/registrants to ARBO annually to ensure that OE TRACKER is up-to-date with newly licensed optometrists.

Fees for ARBO’s auditing service will vary depending on your jurisdiction’s CE requirements, number of licensees/registrants and percentage being audited.

If you or your board is interested in learning more about ARBO’s auditing service, please contact Lisa Fennell at lfennell@arbo.org.

ARBO Extends Rules Modification Through June 30, 2021

Due to continued state restrictions and CDC guidelines related to COVID-19, COPE has made the decision to extend the temporary rules modification to allow COPE Administrators and Providers to present CE activities through an INTERACTIVE ONLINE format and give LIVE COPE CE credit through June 30, 2021. COPE previously announced a temporary modification to the rules through December 31, 2020.

COPE has temporarily modified our rules to allow COPE Administrators and Accredited Providers to give LIVE credit for CE courses if they are presented in an INTERACTIVE DISTANCE LEARNING format. In order to be considered interactive, attendees must be able to have immediate interaction with the instructor (i.e. live webinar, videoconference). The activity can only be presented at one specified time, and once it has taken place the learners may no longer participate in that activity. COPE Administrators and Accredited Providers must have a way to confirm the learners’ attendance for every course before issuing certificates of attendance. Post-course tests will not be required for this modified type of activity.

COPE Administrators and Accredited Providers who are planning to present LIVE CE in an INTERACTIVE DISTANCE LEARNING format should submit all courses and activities to COPE as LIVE. The usual required pre- and post-activity data must be submitted to COPE for activities to be considered COPE Accredited. CEE (transcript quality or certified CE) courses are not included in the waiver. All CEE courses must be presented in person, face-to-face, per State Board requirements regarding CEE.

Please note that although COPE’s rules are being modified to allow INTERACTIVE DISTANCE LEARNING to count as LIVE CE, individual State and Provincial Optometry Boards may have different rules. We advise you to contact the State or Provincial Boards where your attendees are licensed for verification.

If you are planning an ENDURING DISTANCE LEARNING activity where there is not immediate interaction with the instructor and the participants can choose when to participate over a period of time, you should continue to follow COPE’s rules regarding ENDURING DISTANCE LEARNING (a post-course test must be administered which has been reviewed by a school of optometry, medicine, pharmacy or osteopathy.)

We thank all our COPE Administrators and Instructors for all their hard work and dedication during this difficult time. COPE’s guidelines for presenting COPE-Accredited LIVE, INTERACTIVE, DISTANCE LEARNING activities are posted on our website:


If you have questions about the rules modification please contact Sierra Powell, Manager of Accreditation Services, at spowell@arbo.org.
Becoming a review of courses submitted for COPE accreditation will help ensure the quality and independence of continuing education. COPE accreditation benefits both practitioners in your jurisdiction as well as the public that we serve.

What do I need to do to become certified?
- You must complete and submit a course reviewer questionnaire.
- You must be endorsed by your optometry licensing Board; this endorsement will be secured by ARBO once you volunteer.
- You will be asked to complete the online COPE reviewer training that consists of six 10-20 minute self-paced educational modules followed by a short self-assessment.
- Once the training has been successfully completed, you will receive your congratulatory packet of information, including a certificate suitable for framing and a lapel pin.

How much time will this take from my already busy schedule?
- COPE reviewers are not requested to review more than two courses at any given time.
- The review of a course typically takes about 30 minutes.

Please consider volunteering and contributing to the COPE review process!

For more information please visit our website at www.arbo.org and click on COPE, then click on “COPE Reviewers” and “Become a Reviewer” or send an email to arbo@arbo.org.

ARBO BOARD OF DIRECTORS
OFFICERS:
President—Patrick O’Neill, OD, FAAO
Vice President—Coby Ramsey, OD
Secretary-Treasurer—Jeffery Yunker, OD
Immediate Past President—James Campbell, OD

DIRECTORS:
Patricia Bennett, MSW
Thomas Bobst, OD, FAAO
Steven Odekirk, OD
Richard Orgain, OD
Donovan Crouch, OD, Consultant

ARBO STAFF
Lisa Fennell, Executive Director
Ron Cassel, Operations/Finance Manager
Donna DeLay, Program Manager/COPE Administrator
Brittany Howard, MBA, Program Coordinator
Monica McCray, Program Coordinator
Sierra Powell, Manager, Accreditation Services
Audrey Vazquez, Program Coordinator