



*Words of Wisdom, Advice, and
Lessons Learned for Orthopaedic
Practice Professionals*

MY BEST PIECE OF ADVICE

Celebrating 50 Years of Peer-to-Peer
Connections Through AAOE



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INTRODUCTION:

This book is dedicated to all of the past, present, and future members of AAOE, originally founded as the Best Orthopaedic News Exchange Society (BONES), as the association celebrates its 50th anniversary.

BONES was created as a community for orthopaedic practice executives to share knowledge, advice, best practices, and lessons learned with one another. Rebranded as AAOE, the association continues to grow and expand, providing a place for crucial peer-to-peer connections that have propelled careers and forged lifelong friendships.

This advice book commemorates 50 years of connections and community. In this same spirit, former and current members have contributed their best pieces of advice for inclusion in this book.

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The Beginning of BONES

A Community for Orthopaedic Practice Professionals



The history of this organization is a big part of what BONES is today. And it's the people who make up the organization who keep it member-driven. This organization was founded on the desire to network.

Sandy Hamelin, Administrator
Sacramento Knee and Sports
Sacramento, California (quote from Spring 1999 BONES Newsletter)



IMPORTANT DATES:

1969
SEPTEMBER
BONES formed after first meeting in Denver, Colorado

1969
OCTOBER
First newsletter sent

1978
BONES split into Eastern BONES and Western BONES

AAOE was started as BONES (which stood for Best Orthopaedic News Exchange Society) in September of 1969 when a group of 28 orthopaedic administrators gathered in Denver, Colorado to share knowledge and ideas related to orthopaedic practice management. This was an important networking opportunity that had otherwise been lacking in the industry.

The idea caught on, and the first quarterly newsletter was sent in October of 1969 under the leadership of Don Shearer, the first chairman. The newsletter connected orthopaedic administrators across the country, who would submit their practice management questions to be included in the newsletter and receive responses from peers. This popular opportunity to ask and answer questions would eventually lay the foundation for an online community, which started as the AAOE Listerv and is known today as AAOE Collaborate.

In the 1970s and 1980s, BONES continued to grow, meeting in-person each year during the annual Medical Group Manage-



1986

Eastern and Western sections reunited

1989

First national Annual Conference held in Newport, Rhode Island

1989

Board of Directors formed

ment Association (MGMA) meetings. It was also during this time that the association split into Eastern and Western BONES in an effort to make conference travel easier, each section holding their own annual meeting and electing a chair.

Around 1986, the two sections reunited, and in 1989 the first national Annual Conference was held in Newport, Rhode Island. The conference hosted more than 100 attendees, a record-setting number for the young association. The three-day conference included educational sessions and two social events for networking. The events were held at Hammersmith Farm, the Summer White House for President John F. Kennedy, and Belcourt Castle. It was here that the Board of Directors was formed, bylaws were created, and membership dues were established.

DeVota (Dee) Shores from Cedar Rapids, Iowa was elected the first BONES President in 1989 for the 1990 Annual Conference in Sacramento, California.

This was just the beginning!

Pieces of **ADVICE:**



President
2010-2011

“

*The patient always comes first. I always told my staff to remember that patients are hurting when they come to us. **The patient's experience makes or breaks the success of the practice.** So in order of importance (and this advice was given to our doctors): patients first, then the practice, and then yourself.*

The payback for this advice came after one of our doctors retired and spent half his time in another state. He came to me and said, "Mary, I can really see how your dedication to patients pays off. Our staff is much more pleasant and helpful than other practices I have had to visit.

Mary O'Brien, MBA, CMPE, Chief Executive Officer (retired)
Fox Valley Orthopaedic Associates, S.C., Geneva, Illinois



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*Get connected with your peers and **stay connected!***

Mary Partin, Practice Administrator
Bone & Joint Center, Arroyo Grande, California

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Don't ever feel personally responsible for failures (and successes) that are not personally yours.

*As an administrator or chief executive officer, it can be difficult to recognize practice issues, like a downturn in collections or a surprise audit, as simply part of the business and not feel personally responsible. Always perform a root cause analysis and pay attention to conclusions. Don't own more than your share, and **always learn from your experience.***

Jana Foor, CMPE, Administrator

What I wish I had known when starting out.



*Find balance between your professional and personal life as early in your career as possible. Work hard, play hard, but **don't allow your work to consume you** or define who you are as a person. I learned (or finally listened to this) late in my career. Be smarter than I was and make time for yourself and your family.*

Jim Kidd, Chief Executive Officer
Advanced Bone & Joint, St. Peters, Missouri



President
2010-2011



*If you are a new member of AAOE, congratulations! You have made the best decision of your career to join this group. No one understands the nuances of this job at your current place of employment. No one understands this job at home, and none of your friends understand it. It's a niche job, and if you understand you are the true leader, you know you need a team of support outside the building! It's very difficult to survive working alone. **Pace yourself and learn with your peers.** It's way more fun!*

Ann Bullis, CMPE, Administrator
Western Orthopedics, Davis, California



*I have always believed that the most important trait of a leader is integrity, and it must encompass every action that individual takes. In addition to integrity, humility is key. Always put the organization ahead of any individual, including yourself, and always be open to input. **It is also essential to treat every individual with whom one comes in contact with respect.***

Larry Polley, CMPC, CPME, Executive Director
Orthopedic Associates, LLC, St. Louis, Missouri





To succeed in the business of medicine, you need to understand these concepts:

- Each physician practice not only belongs to that physician or group of physicians, it is their life. Each physician's practice is a family business with its own unique culture.
- You must have a real zeal for the job, an attention to detail, and always be ready to adapt.
- When you have the right numbers to look at, most decisions are easy.
- **Be a student of the business every day, every month, every year.**
- This might sound elementary but it is important to never lie. Do not even guess. If you do guess, be sure to make it clear by starting with "I believe" or "I think" and end with "I will find the real answer and get back to you," and include a definite date or timeline for follow-up.

William R. Pupkis, MBA, CMPE, Chief Executive Officer (retired)
Bone & Joint Center, Albany, New York



Take time to think before you react. Negative emotions, more often than not, will cloud your judgement. Not everything has to have an immediate response. You get to decide when and how you respond.

Devan Baker, ATC, Administrator
Proliance Surgeons, Inc., Seattle, Washington



Believe in yourself. Know who you are, as it will be challenged. **Build good teams and support them.** Collaborate, persevere, and believe in lifelong learning – it is an asset.

Patricia L. Brewster, MHA, FACMPE, Chief Executive Officer Emeritus
IntraHealth Group/OrthoAtlanta, Atlanta, Georgia



President
2009-2010

What I wish I had known when starting out.



There is no single management skill, technique, or secret that can assure your success as a practice executive. However, here are a dozen-and-a-half thoughts on how to improve your chances.

1. *Worry does not solve the problem. It inhibits you from being at your best and makes the situation more difficult to resolve.*
2. *Humor is often hidden in the difficult, frustrating things you face. Try to find it. It will keep you sane.*
3. *You can't expect every moment to be fun, but if you do not enjoy what you do professionally, strongly consider doing something else.*
4. *Never underestimate the power of silence in a conversation.*
5. *If you never make anyone mad, you are probably not doing your job.*
6. *There is usually more than one right way to do something. The "best way" is usually found by letting people try something different.*
7. *Allow your employees (especially supervisors) to make mistakes, but try to keep them from failing.*
8. *A principle you are willing to compromise is not really a principle.*
9. *Be fair and consistent with employees. If staff believe you will always act with integrity, you will have their respect and loyalty, even if they disagree with you.*
10. *If you lie to your staff, how can you expect honesty from them?*
11. *It is okay to have favorites - as long as they've earned it for the right reasons.*
12. *The best employees may not always start that way. The best employees do not always remain that way.*
13. *Employees tend to emulate the behaviors they see in you, their supervisors, and the physicians. If management does not like the way the employees behave, it is time for some introspection.*
14. *Don't ask the question if you are not prepared to hear the honest answer.*
15. *Some problems solve themselves. Learn when to be patient.*
16. *Part of your job is managing the physicians' expectations.*



— Continued on page 12

— Continued from page 11

17. *Having good policies is not as important to the practice's success as having good people.*
18. *Always do what is right, no matter how hard it may be.*

Dale Reigle, Chief Executive Officer (retired)
Rocky Mountain Orthopaedic Associates, Inc., Grand Junction, Colorado

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*Creating the state organization BONES of PA was my stepping stone into the national BONES. **My greatest lesson learned on this journey was communication – communication with your peers is the most valuable tool made available by AAOE/BONES.** It opens so many doors, opportunities, and paths to follow for success. It taught me to be a good listener and to evaluate, execute, and above all, enjoy what you are doing.*

Jay Jameson, Administrator
Norristown Orthopaedic Associates, Skippack, Pennsylvania

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*It's never too late to get a college degree! **Never stop learning.***

Karen Sollar, CMPE, Chief Executive Officer
Webster Orthopedics, San Ramon, California



President
2018-2019

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*I do believe that the most important thing I've learned is the value of relationships and the investment one must make to develop them. **We are only who we are because of those we have surrounded ourselves with and invested in.***

Martin Shipman Sr., CMCO, PA, MHA
Physician Assistant, Red Hills Surgery Center, Tallahassee, Florida

What I wish I had known when starting out.



Beyoncé was my motivation!

It isn't always easy to engage staff and get them to realize that what they are doing will help them to grow and develop, and that when they come into work and turn on the "switch" to be their best, that's when the magic happens! Well, many years ago, I discovered the "Beyoncé method." Yes, you read that right, the Beyoncé method.

Beyoncé did an interview once while promoting her album "Who is Sasha Fierce?" and I will never forget it. She discussed the many people who write about her, work with her, and talk with her daily. They experience Beyoncé as "daughter" or "friend" or "boss" or "role model" or "business woman." BUT she said when you look at Beyoncé on the stage, when she is working, then she is no longer Beyoncé the friend, mother, or daughter. She is only "Sasha Fierce."

Beyoncé went on to describe her feelings as she crossed the stage to become the entertainer she was born to be. She was all in, all entertainer, all Sasha Fierce, and gave it everything she had, all of it, no holding back. Why? Because this is part of who she is, this part of her had to be her best in order to fulfill her destiny. She is so right, and even now, I think of her and this particular bit of wisdom often.

Help your staff put on their own Sasha Fierce when they arrive for work. Let them remember as they park in the parking lot, come off the elevator, walk up the stairs, and take a deep breath before coming into the office, that they MUST put on their own Sasha Fierce and be the best they can for their patients, for their doctors, and for their colleagues. Why? Because I have learned that life will eventually meet you effort for effort, task for task, even song for song!

*Do your best. It will make you be the best, and it is absolutely how you will fulfill your destiny. **Do everything fiercely, with all your heart and all your strength, and it will take you to the next step in your journey.** Just look down at your feet. Where they are is where you are destined to be in this moment. Make it the BEST!*



Joe-Annis Iodice, Executive Director (retired)
Comprehensive Orthopaedics, Wallingford, Connecticut



*My first three years in orthopaedic practice management were not easy. I had doctors blaming me for the decisions that were not my own. Finally, I decided that if I was going to get the blame, then I was going to make the decisions. And that's when the practice started to flourish. **You can't be afraid to fail in this business.** Because when you act tentatively, you get clobbered.*

The one thing that stood out to me that I learned early on was that you need to speak in a language that the orthopaedic surgeons will understand. I once had a surgeon talk to me about Yellow Pages ads (back when that was the main means of advertising). He asked me, "So how many hips am I going to have to do to pay for this advertising?" And the light came on. I've used that lesson learned ever since.

Art Nadelman, President
IntelliResources, LLC, Bradenton, Florida



*After taking several looks at the slow-moving clock in high school my teacher quipped, "Milt, time will pass . . . will you?" Well, time indeed does pass. It has been almost 30 years since I walked through the doors at Southern Bone & Joint Specialists in Dothan, Alabama. I retired over three years ago. **Based on my professional and life experiences it makes a lot of sense to offer the following advice: be quick to listen, slow to speak, and slow to become angry.** I am paraphrasing James 1:19. I realize that this is not a new revelation, but I think we all need to be reminded of these truths once in a while. Congratulations to AAOE/BONES on 50 years of dedicated service to its members.*

Milt Wood, Chief Executive Officer/Administrator (retired)
Southern Bone & Joint Specialists, Dothan, Alabama

What I wish I had known when starting out.



Be creative and “think outside the box.” Just because it has never been done before does not mean it cannot be done.

James S. Isom, Executive Vice President/Chief Executive Officer



President
1995-1996



*In private practice, the physician culture that has evolved trumps almost anything else when it comes to implementing change. If you're not sure what “culture” means, in time you will derive a definition that fits the orthopaedic practice you are attempting to lead, manage, and direct. **But this seemingly impenetrable culture will challenge your management skills to execute needed change, and with perseverance, can make this career path professionally rewarding and fulfilling.***

It is like being a parent for the first time: there is no book of instructions to make parenting a successful venture; there are too many variables and unknowns. There are likewise trials in practice administration that will forge your relationship with your physician group that will be at times discouraging and at other times ultimately rewarding. This is a unique position of trust and mutual respect that serves the employees, patients, and physicians. My association with the AAOE was one of the highlights of my career. I met so many other administrators who became friends and peers who helped me along my path. I was at my orthopaedic practice for 28 years.

Michael Newcum, Executive Director (retired)
Plano Orthopedic, Plano, Texas



Listen. Learn. Network. Mentor.

Tina R. Snodderly, CMPE, COO
Tennessee Orthopaedic Clinics, PC, Knoxville, Tennessee





*Don't assume that you are doing a great job for the practice if you aren't hearing anything from the physicians. **You have to ask how you are doing to know for sure.** Some people are impossible to please. Move on to another group rather than put up with all that inappropriate stress.*

Dick Nelson, Chief Executive Officer
The Bone & Joint Center, Bismarck, North Dakota



*The best advice I can give is for new members. Whether you're new to AAOE or new to orthopaedics altogether, **join a committee and get involved right away.** You will meet seasoned veterans who will give you advice that is invaluable.*

Kara H. Harvell, BSN, RN, Practice Administrator
Orthopaedic Specialists, Davenport, Iowa



*My years in orthopaedic administration taught me not to sweat the small stuff. Your day is so full of different things – many all going on at once. **Figure out what is really important to address and let some of that small stuff go.** Many times it was not worth the energy involved. Find a mentor and be a mentor – what you can learn from both experiences is priceless. A dear friend once told me that if everyone is happy with you, you are probably doing something wrong! In administration, there is no way to please everyone, and that is okay. Be proud of the work you do and don't be afraid to say no when you need to.*

Terri A. Wiederhoeft, Practice Administrator
Orthopaedic Associates of Wausau, Wausau, Wisconsin

What I wish I had known when starting out.



Don't be afraid to ask questions, because you are not the first, nor the last person, to have asked the same question at some time during his or her career.

Marsha Young, Chief Executive Officer
Panhandle Orthopaedics, LLC, Crestview, Florida



*The best piece of advice I would give to someone just starting their career, no matter what level of medical group management they are at, is to **find a more experienced mentor; someone who has some battle scars**. As the chief executive officer of a medical group you won't have any peers within your clinic. And while friends at AAOE are invaluable, if they have roughly the same experience as you, they may not be able to be as effective a sounding board as is ideal. I was fortunate to have found a mentor pretty early on. He was more experienced than me and incredibly helpful and supportive and helped guide me along my journey. I would not have been nearly as successful without him to bounce issues off of.*

David Schlactus, Chief Executive Officer
Valley Medical Center, Lewiston, Idaho



President
2011-2012



*As a young professional, I would encourage other young professionals to get involved as a volunteer early on in their careers. Nothing is more valuable than experience. **Always be honest and transparent in your interactions with your co-workers as trust is one of the most important traits in the workplace.***

Alex Sroka, Manager, Digital and Web
Midwest Orthopaedics at Rush, Chicago, Illinois





Once you “solve” an issue, create a schedule to verify that the solution is being followed and is obtaining the results you expected. Too often, we spend valuable time solving an issue only to identify months later that the solution we implemented is no longer being followed or is not garnering the results we anticipated. **A schedule of proactive audits of important procedures can avoid problems.**

Tammie Simao, CMPE, Chief Executive Officer



No matter how tremendous the task, there is always tomorrow. **Take care of yourself, as everything always seems to work out.**

Jeanetta Lawrence, MBA, FACMPE, CPC, CPMA, CMRS,
Chief Operating Officer (retired)
Jewett Orthopaedic Clinic, Winter Park, Florida



Get involved with the day to day activities of your practice. **Don't stay in your office.** You will reap the benefits of your staff feeling more comfortable with you and communicating more. When your staff is happier, your patients are happier. **Happy practice = Happy doctor.**

Shelley Ward, Chief Financial Officer
Florida Sports Orthopaedic & Spine Medicine, Tampa, Florida

What I wish I had known when starting out.



What I wish I knew when I first started out: **chaos and change are normal.**

When I first started as a manager of a four-doctor orthopaedic group I was frequently a fireman instead of the fire chief, running from fire to fire never getting anywhere because there was always another arsonist (intentional and unintentional) who kept creating more chaos. When I'm doing my job as the fire chief, I try to anticipate or prevent fires. Now, when there is no chaos I start to worry.

Also, change is a constant in the mathematical equation of life. To provide higher quality healthcare at a lower cost requires change to be a constant in the equation of running a practice. My greatest lesson learned is to never stop learning—you do not know what you do not know. Never stop networking—the next person you meet could help you in the future or vice versa. Never stop trying to improve and be better than you were yesterday—if you stay the same you are falling behind.

R. Todd Laytham, MBA, CPA, Administrator
Signature Medical Group, St. Louis, Missouri



President
2004-2005



"Surround yourself with quality people whom you can depend upon under any circumstance. Equally as important is to identify your physician leader and educate them and support them."

William G. Hyncik, Jr., MS, Chief Executive Officer
Princeton Orthopaedic Associates, PA, Princeton, New Jersey



President
2001-2002



“ ”

This advice was given to me by one of the orthopaedic surgeons I worked with, and I've shared it many times and hopefully used it wisely: "Pick your battles." It sounds simple, but it is often easy to lose site of the real issue you're dealing with and pick the wrong battle.

I've learned that it is better to dig deeper when there are mistakes or errors made as it is not always the person that may be causing problems, but the process.

Ask the employees their opinions and get them involved. Give them ownership in what you're doing so they see the bigger picture and work together to see the end goal. HAVE FUN—create an environment that is pleasant to work in.

Work hard and be diligent to keep a good balance in life: work can easily take priority when that is not the most valuable asset or experience in life.

Don't let little things that could be potential big things slide—deal with them no matter how uncomfortable it makes you feel. Don't fear confrontation—think of it as "clarification." This has worked for me well (usually).

If you want to get the most out of something—volunteer and join an organization. Being a part of BONES and now AAOE has been a tremendous experience for me. I've learned from attending the conferences, sharing with other administrators, and establishing connections with others who are experiencing the same things I am.

Marsha Pinat, CMPE, Administrator (retired)
Sports Medicine Institute, Clermont, Florida



*As I look back over my years of experience, I have concluded that one of the best tools to have in your CEO toolbox is the ability to have a “vision” for a long-term strategy for your practice. This is something that I feel I have developed over a great period of time and perhaps that’s the way it works, but it sure would have been nice back in the early days to be able to step back and get a better look at the “big picture” of managing and developing a successful group practice with all the right components, attributes, and with the necessary and skilled players. **Certainly surrounding yourself with a team capable of driving the machine forward at the earliest point in your career will definitely pay huge dividends for you in your later years.***

Thomas Wolfe, FACMPE, CASC, CPA, CEO
Premier Bone & Joint Centers, Laramie, Wyoming



President
1997-1998

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It seems to me the longer I am in orthopaedic management the more advice and help I need in problem areas...I would have been much more effective in the beginning in this clinic, had I been able to draw upon such a rich source of background information.

Don Shearer, founding BONES member
(quote from August 1969 included in Spring 1999
BONES Newsletter)

A Growing Association

During the association's early years, member volunteers were responsible for the planning and execution of the Annual Conferences. To determine the location of each conference, members would present their cities for a vote by the general membership. Once the host city was determined, members from that city planned the conference. This included details such as the educational programming, booking the hotel and meeting space, social events, exhibitors and sponsors, and staffing on-site.

It also meant planning that year's conference theme, which included the logo. Mr. BONES, the association's mascot, was prominently featured in the logo alongside playful taglines related to the conference location like BONES and Roses (Portland, 2000), Ride Your BONES (Milwaukee, 2002), and Round Up Your BONES (San Antonio, 1996). The logo was included on the conference shirt and displayed on a large banner hung in the meeting room. A list of conference themes and images can be found on pages 29-31.

An important transformation began in 1993 when BONES was recognized as a partner in orthopaedic clinic operations by the American Academy of Orthopaedic Surgeons (AAOS). In 1995, BONES contracted with AAOS for support services, which included an Executive Director. This contract would eventually expand to include more full-time staff to support BONES' growing membership. This was a critical pivot for the association, which up until that point had been entirely run by volunteers. Now, member volunteers and leadership had the opportunity to play a strategic role in the association's growth with the support of professional staff.



IMPORTANT DATES:

1995

AAOS contracted for support services and Executive Director hired

1997

Benchmarking Survey launched BONES began doing Poster Presentations at the AAOS Annual Meeting

1998

BONES website created

During this time, new initiatives were undertaken to increase membership. In 1996 and 1997, BONES launched its first membership campaign that consisted of a large mailing and participation in AAOS and MGMA Annual Conferences. At the end of this campaign, membership reached record-setting numbers of more than 1,000.

The 2002 BONES Annual Conference was held in Milwaukee at the Midwest Express Center. In response to exhibitor requests for more and higher quality face time with attendees, BONES added specific time slots for attendees to meet with exhibitors who fit their product and service interests.

It was also decided to try vendor-specific session times to give the exhibitors a concentrated timeframe with people who were specifically interested in their products or service. This was tried in response to exhibitor comments requesting more and higher quality face time than the exhibit hall could offer. (The vendors were charged a minimal fee for the room and the rest was up to them).



1999

30th anniversary celebration at the 1999 Annual Conference

2000

BONES members present their first course at the AAOS Annual Meeting

2008

BONES rebranded as the American Association of Orthopaedic Executives

2011

Webinars offered

Listserv launched

In 2008, the organization rebranded as the American Association of Orthopaedic Executives (AAOE).

All along the way, the association's core value of knowledge-sharing and networking remained strong, supported by new member benefits and features such as the addition of its first website and launching an online community, the Listserv, which exploded in popularity. Resources and education expanded with the launch of the Benchmarking Survey and webinars. The association also presented its first course at the AAOS Annual Meeting in 2000.

This laid the foundation for the transformative programs and offerings that come in the years to follow.

BONES CONFERENCE THEMES 1989-2007



1989

Bracing for the Future • Newport, RI



1990

BONES 1990 • Sacramento, CA



1991

Brace Your BONES • Orlando, FL



1995

Ship Your BONES • Long Beach, CA



1996

Round Up Your BONES • San Antonio, TX



1997

Jazz Your BONES • New Orleans, LA



2001

BONES of Steel • Pittsburgh, PA



2002

Ride Your BONES • Milwaukee, WI



2003

BONES with an Altitude • Denver, CO



2007

Blues Your BONES • Chicago, IL

BONES CONFERENCE THEMES 1989-2007



1992

Breaking into the Future • St. Louis, MO



1993

Roll the BONES • Cincinnati, OH



1994

Rocky Mountain High • Vail, CO



1998

Harbour Your BONES • Baltimore, MA



1999

Pack Your BONES • Phoenix, AZ



2000

BONES & Roses • Portland, OR



2004

Dive Into Miami • Miami, FL



2005

Boogie Your BONES on da' Bayou,
New Orleans, LA



2006

Repack Your BONES • Phoenix, AZ



President
1996-1997



*It is perfectly alright to say, “I don’t know, but I know where to get the answer.” Utilize your colleagues in AAOE for help and guidance. They have all been where you are. None of us, regardless of our years of experience, has all the answers. **Build your Rolodex of contacts – that will be one of your most valuable tools, and it is portable.***

Steve P. Fiore, MBA, FACMPE, Chief Executive Officer
Orthopaedic Specialty Group, PC.



***Peer-to-peer connections have helped in allowing me to talk to people who have had similar situations and how they went about making those decisions.** They have provided me with templates for financial decision-making or HR related documentation. If I did not have peer-to-peer connections I would be creating things alone, and that is not the best use of our time.*

Ashesh Chokshi, MBA, MHS, Chief Executive Officer
KSF Orthopaedic, Houston, Texas



President
2017-2018



***There have been countless times when AAOE peers have helped me through critical decisions.** They have been so generous with their time; educating me about specific issues and going out of their way to give me the exact piece of information I needed when I needed it. This has inspired me to do the same for others. Through AAOE’s online community Collaborate, you get to know people. At the conference, you put a face to the name and before you know it you have a friend who asks you about your family and helps you through the challenges you face as an administrator.*

Ron Chorzewski, PT, MBA, CEO
Concord Orthopaedics, P.A., Concord, New Hampshire

Impact of peer-to-peer connections



Plug into your network of AAOE peers and don't hesitate to reach out for guidance on best practices! The group is knowledgeable, collaborative, and always willing to help. Just a phenomenal group of people.

Britt Gondrezick, HR Director
BoulderCentre for Orthopedics, Boulder, Colorado



The collective brainpower of those who share their learning experiences is powerful. Be willing to take time to learn from networking and the Collaborate online "university" where practical tips, tricks, and resources are being shared by fellow administrators. If it could lift up someone who had no prior administrative experience or education into someone who is able to successfully navigate the rigors of a 10 surgeon group, imagine what it can do for you.

Joseph Mathews, PT, DPT, Practice Administrator
Advanced Orthopaedics & Sports Medicine, Houston, Texas



Being an orthopaedic practice manager can be very challenging at times. Situations arise quite frequently that I have never encountered before. It can be overwhelming. My favorite thing about AAOE is that I know now that I am not on an island with these challenges. The networking allows me to get answers when I may not have them myself. Utilizing my resources is the best lesson I have learned.

Brittany Powers, Practice Manager
Orthopaedic Center of the Virginias Management Company, Princeton, West Virginia



“ ”

The two most important
days in your life are the day
you are born, and the day
you find out why.

Mark Twain

American writer, humorist, entrepreneur, publisher,
and lecturer known for *The Adventures of Tom Sawyer*
and *The Adventures of Huckleberry Finn*

Navigating ongoing changes in healthcare



Healthcare is constantly changing and it will be a challenge for any administrator or executive to stay ahead of the changes. **The most effective way to manage change is to partner with individuals who are enduring the same pressures of finding talent to meet the demands; training and educating employees, providers, and patients according to the changes; engaging in strategic planning more than once a year to stay ahead of looming legislative bills and regulatory requirements; and surrounding yourself with experience and expertise that have endured previous changes in healthcare.**

Brian S. Bizub, BSHA, Chief Executive Officer
Raleigh Orthopaedic Clinic, Raleigh, North Carolina



We are heard when we speak together. It takes a commitment from the doctors we work for and each of the administrative leaders. **We need to stand together for the benefit of our patients to protect affordable orthopaedic care.**

Jan Vest, MBA, Chief Executive Officer Emeritus
Signature Medical Group, St. Louis, Missouri



President
2016-2017



As members of AAOE and leaders of our practices, it is the responsibility of each practice leadership team to challenge their organization, the communities we work in, and the AAOE association itself to innovate and change how healthcare is delivered. **Get engaged, contribute your time and talent, and constantly look at how we can share our successes and failures with our physician leadership, vendors, healthcare provider partners, payers, and ancillary projects.**

Donald Schreiner, Chief Executive Officer
Orthollinois, Rockford, Illinois



President
2014-2015

“”

One important key
to success is
self-confidence.
An important key to
self-confidence
is preparation.

Arthur Ashe

American professional tennis player Winner
of three Grand Slam titles

The best piece of advice you've been given



*The best advice I received prior to becoming a group practice administrator was to negotiate an employment agreement to understand my responsibilities and expectations of the group. **The best advice I would suggest is that, as the administrator, you always put the importance of the group first.***

Mike Immel, Practice Administrator (retired)



President
1981



*This advice is simple but potent: **“Never underestimate the power of what you say. It will affect someone now and possibly forever.”** I received this advice from my regional director, Bill Birmingham, when I was a brand new administrator in 1998. Regardless of your role, personal or professional, each and every word you say will affect someone. Even if you think your words are not important at the time, their effect will possibly be beyond your imagination! We need to think before we speak as leaders, as spouses, as parents, colleagues, and as friends because our words represent who we are.*

Kara Fiske, LNHA, Chief Executive Officer/Administrator
Orthopaedic and Sports Medicine Center, Manhattan, Kansas



*The best advice I ever received was from the gentleman who I replaced in my first orthopaedic management position. That advice was “You have to join **BONES!** It’s the best group out there to learn from and contribute to.” He was, of course, correct. **BONES - now AAOE - IS the best resource for networking and education for orthopaedic managers and administrators.***

Tim Pella, CMPE, Practice Manager
Southeast Iowa Orthopaedics & Sports Medicine, Burlington, Iowa



President
1998-1999



The best piece of advice you've been given



The greatest piece of advice I have been given was from a fellow administrator who was older and much wiser than me, who said, "Just remember, doctors will never invite you to Thanksgiving dinner." **It was meant to remind me that as close as you think you might be to your doctors you can easily be replaced.**

So watch out for yourself.
I believe this to be true.

Cynthia Everlith, BSHA, CPC, AAPC, Fellow Practice Administrator
Endocrinology Associates, Scottsdale, Arizona



President
2013-2014

A List of Principles to Guide Leaders:

1. Persistence and passion produce results.
2. Anticipate requirements and trends...then do something.
3. Timing and packaging are key (pick the right time and make it an irresistible package).
4. Health skepticism...not sarcasm.
5. Recruit and retain the best people.
6. Take time for family and fun-- play hard to recharge your batteries.
7. Trust, loyalty, and integrity are non-negotiable.
8. Demand high standards, test people, and push them to excel.
9. Commander's intent = purpose, priorities, and expected end state (visualize it).

George D. Trantow, FACHE, CMPE, Chief, Physician Operations
Valley View Hospital, Glenwood Springs, Colorado

“”

Nobody who ever gave his
best regretted it.

George Halas

Founder, owner, and head coach of the Chicago Bears

“ ”

You don't have to be great
to get started, but you
have to get started to be
great.

Les Brown

Motivational speaker, author, and radio DJ
Former television host and politician

Advice for expanding your network



Presenting at the AAOE Annual Conference allows members to learn from your experiences, and it helped to expand my network within AAOE and beyond. My first presentation exposed me to a group of members that were interested in my presentation topic, and then I spent the rest of the conference being asked questions, which allowed me to interact with other members and assisted me in creating relationships with members who I felt comfortable reaching out to when I needed to create a new service line, enhance a program, or ask for advice on how to deal with an issue. I was fortunate to be elected to the AAOE Board of Directors, which was one of the best experiences in my professional career. I have held many board positions over the past 30 years of working in both the hospital and private practice sector, but I still refer to many of the current and previous AAOE board members and AAOE staff as family.



Brian S. Bizub, BSHA, Chief Executive Officer
Raleigh Orthopaedic Clinic, Raleigh, North Carolina



The best thing I ever did to expand my network was attending AAOE conferences and being active in the Listserv [now AAOE Collaborate]. I learned and met people at every conference. For example 8-9 years ago I listened to a presentation on co-management agreements with the hospitals. Then in 2011 our hospital become a part of Johns Hopkins Health. I knew that Johns Hopkins' model is to employ physicians. Our private orthopaedic group was the first group to do a co-management agreement with Johns Hopkins. That knowledge and those ideas came from peers I had networked with at AAOE.



Debra L. Mitchell, RN, MBA, Administrator (retired)
Children's Orthopaedic and Scoliosis Surgery Associates, St. Petersburg, Florida



Volunteering for AAOE has been extremely rewarding personally and professionally. Working for a small practice, I did not have any mentors or experienced colleagues to lean on when I began. AAOE provided me with a mentor and through the old Listserv [now AAOE Collaborate], I expanded that network even more, which led me to volunteer for the Membership Council where I formed friendships and vital contacts. **I believe we benefit from AAOE based on what we put into AAOE.** It's tough to pick up the phone, ask for help, and also to believe you are able to contribute, but in the end it's so worth it to participate! Share experiences and reach out online and at the Annual Conference even if it's uncomfortable at first. The contacts, support, and information I have received the past 12 years because of volunteering are priceless.

Francis "Sam" Santschi, JD, Practice Administrator
Diana L. Kruse, MD, Sauk City, Wisconsin



When I was a newer AAOE member I used to just read all of the Listserv [now AAOE Collaborate] posts and take in all of the great advice and information. Once I started posting and sharing, then people started looking for me at the Annual Conference. I have been amazed at the network of wonderful colleagues and friends I have made through my years with AAOE. **The Collaborate online community and the Annual Conference have given me such a big network for resources that even my physicians now ask me what my AAOE colleagues are doing with different scenarios!** My advice is to get involved and your network will grow.

Sami Spencer, FACMPE, CMM, Chief Executive Officer
Missoula Bone & Joint, Missoula, Montana

Advice for expanding your network



Prior to my membership in AAOE, I was part of the school of thought that said, "I am simply TOO BUSY to attend conferences!" But I began participating in what was then a Listserv that predated the AAOE Collaborate online community, and from that participation was asked to present at the 2005 national BONES Conference. There I met people I'd only known via email before and was exposed to not only the finest educational content I had experienced in my prior 10 years as an administrator, but also some of the most wonderful peers, many of whom were on the Listserv but did not post and considered themselves "lurkers." It greatly expanded my network and also led me to join Midwest AAOE, where I was able to connect and work with colleagues closer in proximity to my location.

My perspective has flipped 180 degrees, and now I feel as if I cannot afford NOT to attend conferences and network with peers. If you do not want to re-invent the wheel every time you encounter a problem or situation you haven't dealt with before, there is no better way to ensure the best input and objective opinions in the shortest amount of time than to query your AAOE peer network.

Barbara Sack, MHSA, CMPE, Executive Director
Midwest Orthopaedics, PA, Shawnee Mission, Kansas



President
2012-2013



I'm fairly new to AAOE, but my best piece of advice is get involved. **The more you put in the more you will get out.**

Tara Holicky, Administrator
Greater Chesapeake Hand to Shoulder, Lutherville, Maryland



Advice for expanding your network



President
1999-2000

The best thing I did to expand my network was spending extra time with members in the evening at the Annual Conference sharing experiences and learning how different members handled things we were all being confronted with. It saved me so much time in resolving issues that I was dealing with knowing how other members dealt with those issues. The educational sessions during the day were very beneficial, but the time spent interacting with other members after the sessions was the most beneficial.

Stan Phillips, Business Manager/Administrator (retired)
Ohio Orthopaedics and Sports Medicine, Inc., Findlay, Ohio



*With 20 plus years as a member of AAOE, my personal growth and my career growth have both been impacted by AAOE experiences. I joined AAOE, which was then BONES, in 1997 just as I was transitioning from a major corporate health delivery system to an independent physician practice. In my previous setting I relied on expertise and advice from individuals within the organization who specialized in HR or budget, or compliance. In my new setting I had to seek out this expertise and these resources in order to make informed decisions and to keep abreast of emerging trends. **AAOE was THE place to find what I needed to succeed.** And, of course, it has been THE place to connect with others in like situations which has helped me to grow as an administrator and as a person.*

Craig C. Henry, MHA, Administrator
Hand Center of Louisiana, Metairie, Louisiana

“”

Surround yourself with
only people who are going
to lift you higher.

Oprah Winfrey

Media executive, actress, talk show host, television producer,
and philanthropist

“”

Educating yourself does not mean that you were stupid in the first place; it means that you are intelligent enough to know that there is plenty left to learn.

Melanie Joy

Social psychologist and vegan activist

The Future is Bright: Increasing Industry Impact



We all have come a long way and changes continue to occur in our professional and personal lives. It is interesting how we can be so adaptable to changes over time. Thank you AAOE members for your networking, education, and dedication to this outstanding organization as we help serve healthcare.”

Dave Demchuk, Chief Executive Officer (retired)
Front Range Orthopedics and Spine, Longmont, Colorado



President
2007-2008

In 2013, the association made another major move when it relocated to Indianapolis as a standalone association. This paved the way for even more opportunity to expand, grow, and innovate.

Since then, AAOE has launched a number of initiatives to expand offerings to support members and their practices.

The American Alliance of Orthopaedic Executives, a 501 (c) (6) organization was created in 2017 to open greater lobbying and advocacy opportunities for members. During this same year, AAOE held its first standalone Capitol Hill Day, where members of the orthopaedic community gathered on the Hill to meet with Members of Congress and their staff to advocate on issues impacting the community. Attendees representing 16 states participated in a total of 47 meetings with Members of Congress and their staff.

AAOE members who were not able to attend joined efforts by sending a total of 494 letters to legislators in support of efforts on the Hill.



IMPORTANT DATES:

2012

Membership opened to all senior and middle level staff and physicians

2013

AAOE moved to Indianapolis as a standalone association

2017

Development of the 501 (c)(6) American Alliance of Orthopaedic Executives for greater lobbying and advocacy capabilities



That same year, AAOE began offering staff training programs including the Casting and Splinting Program, and Practice Management 101. In 2018, the CEMA-O credential was created to provide an E&M Coding and Auditing credential specifically for orthopaedics. These programs allow members to train staff consistently and affordably.

In today's rapidly evolving healthcare environment, having access to the right data is essential. AAOE's Data Solutions continue to grow according to these pressing industry needs.

The development of the AAOE Data Portal has enhanced the Benchmarking Survey experience on a user-friendly online format. The Benchmarking Results are made available in that same portal to allow for the creation of customizable reports using filters such as practice size, region, state, specialty, and others so that users can view the data that is most relevant to



2017

AAOE Collaborate online community launched

Launch of new AAOE educational programming including Casting and Splinting Program and Practice Management 101

First AAOE Capitol Hill Day held

2018

CEMA-O credential and training offered

Data Warehouse launched, approved as a 2018 Qualified Clinical Data Registry (QCDR) by CMS

2019

AAOE 50th Anniversary

their practice – an important feature for using the data in decision-making.

In 2018, the AAOE Data Warehouse launched. Approved as a 2018 Qualified Clinical Data Registry (QCDR) by CMS, the Data Warehouse provides patient satisfaction, patient-reported outcomes, and quality reporting for orthopaedic practice professionals.

The growth and development over the past 50 years is an accomplishment to celebrate. The community created in 1969 has persisted throughout half a century, sustaining its strong roots in peer-to-peer connections.

This is a pivotal moment for AAOE, commemorating the milestones that have led the association to where it is today while looking ahead to a bright future.

“”

Success is finding
satisfaction in giving
a little more than
you take.

Christopher Reeve

Actor best known for his motion picture portrayal of Superman

What do you hope to get out of your membership?



I hope to get practical advice from my peers! They're in my shoes and I believe the best advice comes from those with that specific experience.



Stephanie Crum, Manager of Patient Services
Scott Orthopedic Center, Huntington, West Virginia



I hope to be able to utilize this membership as a resource as I continue to learn the orthopaedic specialty and improve my leadership skills. This is my first true managerial position and I have already learned a great deal from the resources available within this organization – including webinars, message boards, etc. I feel as though it will continue to provide a great deal of value as I navigate down this career path.



Joanna Bosch, RN, MSN, Clinic Nurse Supervisor



*I hope to gain knowledge by sharing information amongst other professionals in the same or similar roles. **Having a network of colleagues to collaborate information is such an asset!***



Jenna Breedlove, Revenue Cycle Manager
Arlington Orthopedic Associates, P.A., Arlington, Texas

What do you hope to get out of your membership?



*My first Annual Conference in Orlando this year gave me a great networking opportunity, which allowed me to discuss current challenges we all face, and share solutions and best practices. **It was a great way to recharge and further my professional development while forming new friendships.** With our constantly changing environment I believe the AAOE and the Data Warehouse and webinars will continue to provide a valuable service.*

Wendy Lee White, Senior Executive Vice President
Florida Spine and Joint Institute, Coral Springs, Florida



It is not in the stars to hold our
destiny but in ourselves.

William Shakespeare
English poet, playwright, and actor



President
2016-2017



AAOE is the evolution of a grass roots history of orthopaedic practice administrators working to improve their skills and now is in the process of becoming a national go-to organization for orthopaedic practice management education, advocacy, analytics, and clinical work flow improvement resources. *The best things happen when we don't care who gets the credit.* AAOE is every person that is in the journey of supporting physicians in the care and treatment of patients.

Jan Vest, MBA, CEU Emeritus
Signature Medical Group, St. Louis, Missouri



President
2015-2016



The future of AAOE is promising! *For AAOE's legacy to continue, current leaders must pass on the importance of education and connection among members to the next generation of executives.* As we watch other non-profit membership organizations struggle, we must focus our efforts over the next 10 years in making AAOE a valued asset worth keeping. We can do this!

Jim Kidd, CMPE, Chief Executive Officer
Advanced Bone & Joint, St. Peters, Missouri



AAOE will continue to be a resource for orthopaedic executives. *As healthcare becomes more data driven, AAOE has positioned itself well with the Data Warehouse and the Benchmarking Survey to provide the information that will be necessary.* This in addition to AAOE education and advocacy programs will be vital for all current and future orthopaedic executives and managers.

Chad Sackman, RN, MBA, Chief Operating Officer
Signature Medical Group, Saint Louis, Missouri

How will AAOE's role in the industry evolve?



AAOE will be a leading voice for pro-active change and a knowledge base for all stakeholders. Our work in Washington and at the state level will help revolutionize the delivery model for orthopaedic and musculoskeletal healthcare. AAOE will greatly influence quality standards for our industry.



Francis "Sam" Santschi, JD, Practice Administrator
Diana L. Kruse, MD, Sauk City, Wisconsin

“ ”

Everyone here has the sense
that right now is one of
those moments when we are
influencing the future.

Steve Jobs

Entrepreneur and business magnate

Co-founder of Apple

Past AAOE/BONES Presidents

Thank you for your many years of dedicated service!



Ron Chorzewski
MBA, PT
2017-2018



Jan C. Vest, MBA
2016-2017



Jim P. Kidd, CMPE
2015-2016



Donald A. Schreiner
MBA
2014-2015



George D. Trantow
FACHE, CMPE
2013-2014



Barbara Sack, MHSA,
CMPE
2012-2013



David Schlactus, MBA,
CMPE
2011-2012



Mary O'Brien, MBA,
CMPE
2010-2011



Patricia L. Brewster,
MHA, FACMPE
2009-2010



Dale Reigle
2008-2009

Past AAOE/BONES Presidents

Thank you for your many years of dedicated service!



David Demchuk
2007-2008



Thomas Potts
2006-2007



Ann Lesini
2003-2004



Greg Spurlock
2002-2003



Stanley H. Phillips
1999-2000



Timothy Pella, CMPE
1998-1999



Paul King
1996-1996



James S. Isom
1995-1996



William Turnage
1992-1993



William Ginn
1991-1992



James M. Gdula
2005-2006



**R. Todd Laytham, MBA,
CPA**
2004-2005



William G. Hyncik, Jr., MS
2001-2002



O. Patrick Page, CPA
2000-2001



**Thomas Wolfe, FACMPE,
CASC, CPA**
1997-1998



**Steve Fiore, MBA,
FACMPE**
1996-1997



Donna S. Wood
1994-1995



Lee Davis
1993-1994



Michael F. Allyn
1990-1991



DeVota (Dee) Shores
1989-1990

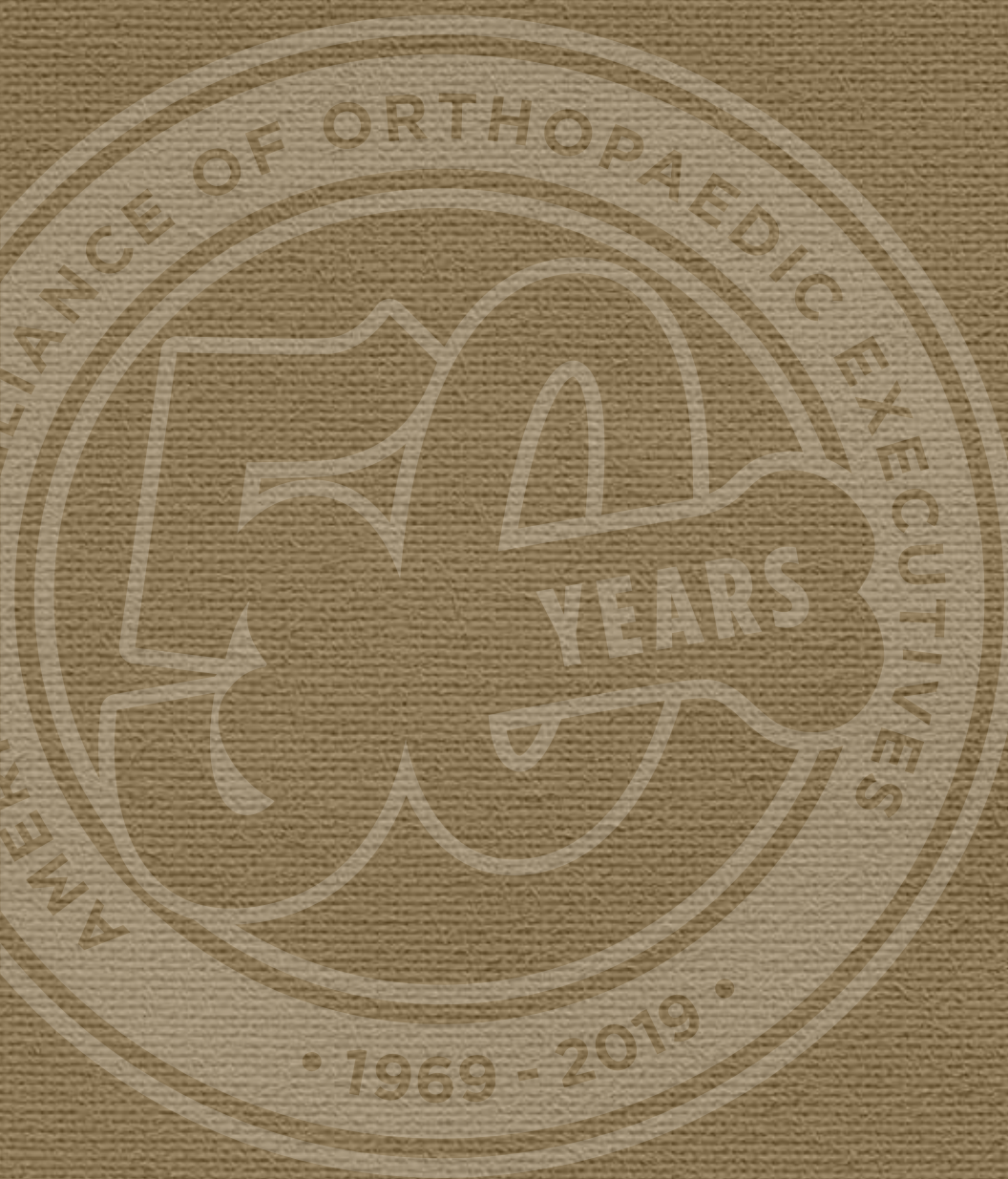
Acknowledgements

Thank you to the past and current AAOE members who provided their advice, words of wisdom, and lessons learned for inclusion in this anniversary book.

- **Devan Baker, ATC**, Administrator, Proliance Surgeons, Inc., Seattle, Washington
- **Brian S. Bizub**, Chief Executive Officer, Raleigh Orthopaedic Clinic, Raleigh, North Carolina
- **Joanna Bosch, RN, MSN**, Clinic Nurse Supervisor
- **Jenna Breedlove**, Revenue Cycle Manager, Arlington Orthopedic Associates, P.A., Arlington, Texas
- **Patricia L. Brewster, MHA, FACMPE**, Chief Executive Officer Emeritus, IntraHealth Group/OrthoAtlanta, Atlanta, Georgia
- **Ann Bullis, CMPE**, Administrator, Western Orthopedics, Davis, California
- **Ashesh Chokshi, MBA, MHS**, Chief Executive Officer, KSF Orthopaedic, Houston, Texas
- **Ron Chorzewski, PT, MBA**, CEO, Concord Orthopaedics, P.A., Concord, New Hampshire
- **Stephanie Crum**, Manager of Patient Services, Scott Orthopedic Center, Huntington, West Virginia
- **Dave Demchuk**, Chief Executive Officer (retired), Front Range Orthopedics and Spine, Longmont, Colorado
- **Cynthia Everlith, BSHA, CPC, AAPC**, Fellow Practice Administrator, Endocrinology Associates, Scottsdale, Arizona
- **Steve P. Fiore, MBA, FACMPE**, Chief Executive Officer, Orthopaedic Specialty Group, PC
- **Kara Fiske, LNHA**, Chief Executive Officer/Administrator, Orthopaedic and Sports Medicine Center, Manhattan, Kansas
- **Jana Foor, CMPE**
- **Britt Gondrezick**, HR Director, BoulderCentre for Orthopedics, Boulder, Colorado
- **Kara H. Harvell, BSN, RN**, Practice Administrator, Orthopaedic Specialists, Davenport, Iowa
- **Craig C. Henry, MHA**, Administrator, Hand Center of Louisiana, Metairie, Louisiana
- **Tara Holicky**, Administrator, Greater Chesapeake Hand to Shoulder, Lutherville, Maryland

- **William G. Hyncik, Jr., MS**, Chief Executive Officer, Princeton Orthopaedic Associates, PA, Princeton, New Jersey
- **Mike Immel**, Practice Administrator (retired)
- **Joe-Annis Iodice**, Executive Director (retired), Comprehensive Orthopaedics, Wallingford, Connecticut
- **James S. Isom**, Executive Vice President/Chief Executive Officer
- **Jay Jameson**, Administrator, Norristown Orthopaedic Associates, Skippack, Pennsylvania
- **Jim Kidd**, Chief Executive Officer, Advanced Bone & Joint, St. Peters, Missouri
- **Jeanetta Lawrence, MBA, FACMPE, CPC, CPMA, CMRS**, Chief Operating Officer (retired), Jewett Orthopaedic Clinic, Winter Park, Florida
- **R. Todd Laytham, CPA**, Administrator, Signature Medical Group, St. Louis, Missouri
- **Joseph Mathews, PT, DPT**, Practice Administrator, Advanced Orthopaedics & Sports Medicine, Houston, Texas
- **Debra L. Mitchell, RN, MBA**, Administrator (retired), Children's Orthopaedic and Scoliosis Surgery Associates, St. Petersburg, Florida
- **Art Nadelman**, President, IntelliResources, LLC, Bradenton, Florida
- **Dick Nelson**, Chief Executive Officer, The Bone & Joint Center, Bismarck, North Dakota
- **Michael Newcum**, Executive Director (retired), Plano Orthopedic, Plano, Texas
- **Mary O'Brien, MBA, CMPE**, Chief Executive Officer (retired), Fox Valley Orthopaedic Associates, S.C., Geneva, Illinois
- **Mary Partin**, Practice Administrator, Bone & Joint Center, Arroyo Grande, California
- **Tim Pella, CMPE**, Practice Manager, Southeast Iowa Orthopaedics & Sports Medicine, Burlington, Iowa
- **Stan Phillips**, Business Manager/Administrator (retired), Ohio Orthopaedics and Sports Medicine, Inc., Findlay, Ohio
- **Marsha Pinat, CMPE**, Administrator (retired), Sports Medicine Institute, Clermont, Florida
- **Larry Polley, CPA, CMPE**, Executive Director, Orthopedic Associates, LLC, St. Louis, Missouri
- **Brittany Powers**, Practice Manager, Orthopaedic Center of the Virginias Management Company, Princeton, West Virginia
- **William R. Pupkis, MBA, CMPE**, Chief Executive Officer (retired), Bone & Joint Center, Albany, New York

- **Dale Reigle**, Chief Executive Officer (retired), Rocky Mountain Orthopaedic Associates, Inc., Grand Junction, Colorado
- **Barbara Sack, MHSA, CMPE**, Executive Director, Midwest Orthopaedics, PA, Shawnee Mission, Kansas
- **Chad Sackman, RN, MBA**, Chief Operating Officer, Signature Medical Group, St. Louis, Missouri
- **Francis “Sam” Santschi, JD**, Practice Administrator, Diana L. Kruse, MD, Saulk City, Wisconsin
- **David Schlactus**, Chief Executive Officer, Valley Medical Center, Lewiston, Idaho
- **Donald Schreiner**, Chief Executive Officer, OrthoIllinois, Rockford, Illinois
- **Martin Shipman, Sr., CMCO, PA, MHA**, Physician Assistant, Red Hills Surgery Center, Tallahassee, Florida
- **Tammie Simao, CMPE**
- **Tina Snodderly, CMPE, COO**, Tennessee Orthopaedic Clinics, PC, Knoxville, Tennessee
- **Karen Sollar, CMPE**, Chief Executive Officer, Webster Orthopedics, San Ramon, California
- **Sami Spencer, FACMPE, CMM**, Chief Executive Officer, Missoula Bone & Joint, Missoula, Montana
- **Alex Sroka**, Manager, Digital and Web, Midwest Orthopaedic at Rush, Chicago, Illinois
- **George D. Trantow, FACHE, CMPE**, Chief, Physician Operations, Valley View Hospital, Glenwood Springs, Colorado
- **Jan Vest, MBA**, Chief Executive Officer Emeritus, Signature Medical Group, St. Louis, Missouri
- **Shelley Ward**, Chief Financial Officer, Florida Sports Orthopaedic & Spine Medicine, Tampa, Florida
- **Terri A. Weiderhoeft**, Practice Administrator, Orthopaedic Associates of Wausau, Wausau, Wisconsin
- **Wendy Lee White**, Senior Executive Vice President, Florida Spine and Joint Institute, Coral Springs, Florida
- **Thomas Wolfe, FACMPE, CASC, CPA**, CEO, Premier Bone & Joint Centers, Laramie, Wyoming
- **Milt Wood**, Chief Executive Officer/Administrator (retired), Southern Bone & Joint Specialists, Dothan, Alabama
- **Marsha Young**, Chief Executive Officer, Panhandle Orthopaedics, LLC, Crestview, Florida



Advice Book Compiled and Edited by
Alyssa Gibson

“ ”

The history of this organization is a big part of what BONES is today. And it's the people who make up the organization who keep it member-driven. This organization was founded on the desire to network.

Sandy Hamelin, Administrator
Sacramento Knee and Sports
Sacramento, California (quote from Spring 1999 BONES Newsletter)

BONES was created as a community for orthopaedic practice executives to share knowledge, advice, best practices, and lessons learned with one another. Rebranded as AAOE, the association continues to grow and expand, providing a place for crucial peer-to-peer connections that have propelled careers and forged lifelong friendships.

This advice book commemorates 50 years of connections and community. In this same spirit, former and current members have contributed their best pieces of advice for inclusion in this book.



American **Association**
of Orthopaedic Executives

American **Alliance**
of Orthopaedic Executives