2019 National Orthopaedic Leadership Conference

Agenda and Background Materials

June 5-8, 2019

JW Marriott Hotel
Washington, DC
## Agenda

### Wednesday, June 5

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<tr>
<th>Time</th>
<th>Event</th>
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<tbody>
<tr>
<td>12:00PM – 5:00PM</td>
<td>LFP Media Training</td>
<td>Treasury</td>
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<tr>
<td>12:00PM – 8:00PM</td>
<td>Registration</td>
<td>Grand Foyer A</td>
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<tr>
<td>1:00PM – 5:00PM</td>
<td>Media Training (registration required)</td>
<td>Senate</td>
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<tr>
<td>3:00PM – 5:00PM</td>
<td>Resident Assembly Executive Committee</td>
<td>Penn Ave Terrace</td>
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<tr>
<td>5:00PM – 6:30PM</td>
<td>Hill Visit Training</td>
<td>Salon IV</td>
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<tr>
<td>6:30PM – 8:00PM</td>
<td>Welcome Reception/Dinner</td>
<td>Salons II &amp; III</td>
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<tr>
<td>7:00PM – 10:00PM</td>
<td>Orthopaedic PAC Capitol Club Celebration (tickets required)</td>
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<td></td>
<td>at La Vie, 88 District Square SW, Rooftop</td>
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<td>Time</td>
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<tr>
<td>6:00AM – 11:00AM</td>
<td>Registration</td>
<td>Grand Foyer A</td>
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<tr>
<td>6:30AM – 8:30AM</td>
<td>Breakfast</td>
<td>Grand Foyer</td>
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<tr>
<td>7:00AM – 8:30AM</td>
<td>BOS Nominating Committee</td>
<td>Commerce</td>
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<td>7:00AM – 9:00AM</td>
<td>BOC Communications Committee</td>
<td>Salon I</td>
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<td>7:00AM – 9:00AM</td>
<td>BOC State Orthopaedic Societies Committee</td>
<td>Treasury</td>
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<td>8:00AM – 9:00AM</td>
<td>BOC Advocacy Resource Committee</td>
<td>Salon IV</td>
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<td>8:00AM – 9:00AM</td>
<td>BOC Research and Quality Committee</td>
<td>State</td>
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<tr>
<td>8:30AM – 9:30AM</td>
<td>BOS Executive Committee</td>
<td>Commerce</td>
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<tr>
<td>9:00AM – 3:00PM</td>
<td>Open House at the AAOS Office of Government Relations</td>
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<tr>
<td>9:30AM – 4:00PM</td>
<td>Capitol Hill Visits</td>
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<tr>
<td>2:00PM – 7:30PM</td>
<td>Registration</td>
<td>Grand Foyer A</td>
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<tr>
<td>3:00PM – 4:30PM</td>
<td>BOC Nominating Committee</td>
<td>Congressional</td>
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<tr>
<td>4:30PM – 5:30PM</td>
<td>BOC Executive Committee</td>
<td>Commerce</td>
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<tr>
<td>5:30PM – 6:30PM</td>
<td>Capitol Hill Debriefing</td>
<td>Salon I</td>
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<tr>
<td>6:30PM – 8:00PM</td>
<td>Reception/Dinner</td>
<td>Salons II, III &amp; IV</td>
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### Friday, June 7

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<thead>
<tr>
<th>Time</th>
<th>Event</th>
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<tbody>
<tr>
<td>6:00AM – 5:00PM</td>
<td>Registration</td>
<td>Grand Foyer A</td>
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<tr>
<td>6:15AM – 8:30AM</td>
<td>Breakfast</td>
<td>Grand Foyer</td>
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<tr>
<td>7:00AM – 9:00AM</td>
<td>BOS Business Meeting</td>
<td>Salons III &amp; IV</td>
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<td>7:00AM – 9:00AM</td>
<td>BOC Economic Issues Committee</td>
<td>Russell</td>
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<td>9:00AM – 10:00AM</td>
<td>BOC/BOS Open Hearing</td>
<td>Salons III &amp; IV</td>
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<td></td>
<td>• Advisory Opinions</td>
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<tr>
<td>10:10AM – 5:00PM</td>
<td><strong>General Session</strong></td>
<td>Salons III &amp; IV</td>
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<tr>
<td>10:10AM – 10:15AM</td>
<td>Welcome and Opening Remarks</td>
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<tr>
<td>10:15AM – 12:00PM</td>
<td><strong>General Session</strong></td>
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<td>10:15AM – 10:45AM</td>
<td>PL Update with Strat Plan Rollout</td>
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<td>10:45AM – 11:45AM</td>
<td>Symposium I: Core Values</td>
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<td></td>
<td>Overview: The session will be utilized to roll out the new Core Values for the AAOS and educate attendees on the process used to develop the values.</td>
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<td></td>
<td>Moderators: James R. Ficke, MD; Wayne A. Johnson, MD; Kevin D. Plancher, MD, MPH, MS</td>
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<td></td>
<td>Staff: Todd Applebaum, MBA and Donna J. Malert, CAE</td>
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<td>11:45AM – 12:00PM</td>
<td>Award Presentations</td>
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<td></td>
<td>• Stuart L. Weinstein, MD PAC Participation Awards</td>
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<td>• State Awards</td>
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<td>12:00PM – 1:00PM</td>
<td>Lunch with Guest Speaker, Deputy Surgeon General</td>
<td>Salons I &amp; II</td>
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<td>Rear Admiral Erica G. Schwartz, MD, JD, MPH</td>
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<td>1:00PM – 5:00PM</td>
<td><strong>General Session</strong></td>
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<td>1:00PM – 3:00PM</td>
<td>Symposium II: Advocacy (5 Breakout Sessions)</td>
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<td>Overview: This symposium will focus on AAOS advocacy. It will allow an opportunity to engage the attendees in providing feedback on key advocacy initiatives that may further shape the regulatory and legislative efforts of the AAOS.</td>
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<td>Moderator: Wilford K. Gibson, MD</td>
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<td></td>
<td>Presenters: Wilford K. Gibson, MD; M. Bradford Henley, MD, MBA, FACS; John T. Gill, MD</td>
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<td></td>
<td>Staff: Catherine Boudreaux Hayes and Graham Newson</td>
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<td>Group 1</td>
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<td>Dirksen</td>
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<td>Group 6</td>
<td>Salons III &amp; IV</td>
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<td>3:00PM – 3:15PM</td>
<td><strong>Break</strong></td>
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<td>3:15PM – 4:15PM</td>
<td><strong>Symposium III: Leadership</strong>&lt;br&gt;Overview: Symposium attendees will have the opportunity to engage in discussion and learn about leadership initiatives for the AAOS.&lt;br&gt;Moderator: Joseph A. Bosco, III, MD&lt;br&gt;Presenters: Dirk H. Alander, MD, MHA; Robert M. Orfaly, MD; Thomas C. Barber, MD&lt;br&gt;Staff: Todd Applebaum, MBA and Donna J. Malert, CAE</td>
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<td>4:15PM</td>
<td><strong>Adjourn for the Day</strong></td>
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<td>4:15PM – 5:00PM</td>
<td><strong>BOC/BOS Resolutions Committee</strong></td>
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<td>5:00PM – 6:00PM</td>
<td><strong>LFP and Presidential Line Meeting</strong></td>
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<td>5:30PM – 7:00PM</td>
<td><strong>Reception at the AAOS Office of Government Relations</strong>&lt;br&gt;317 Massachusetts Avenue, NE; Telephone: 202/546-4430</td>
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<td>7:00PM</td>
<td><strong>Free evening</strong></td>
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<td>Breakfast</td>
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<td>BOC Business Meeting</td>
<td>Salons III &amp; IV</td>
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<td>8:00AM – 11:15AM</td>
<td>General Session</td>
<td>Salons III &amp; IV</td>
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<td>8:00AM – 10:00AM</td>
<td>Symposium IV: Quality and Value</td>
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<td>Overview: The symposium will include a short presentation highlighting the shift to value-based healthcare and how we can prepare our members to thrive in this system.</td>
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<td>Moderator/Presenter: Robert H. Quinn, MD</td>
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<td>Staff Liaison: Jayson N. Murray, MA</td>
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<td>Group 1</td>
<td>Commerce</td>
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<td>Group 6</td>
<td>Salons III &amp; IV</td>
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<td>10:00AM – 11:00AM</td>
<td>BOC/BOS Business Meeting (only BOC/BOS Members may vote)</td>
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<td></td>
<td>• BOC/BOS Resolutions Committee Report</td>
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<td>11:00AM – 11:15AM</td>
<td>Closing Remarks and Adjourn</td>
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</table>

Informational Items:

- AAOS Strategic Plan
- Disclosure Policy and Registrants’ Disclosures
- AAOS Code of Ethics for Governance and Management
- AAOS Antitrust Reminder
- CME Credit Information and Faculty Disclosures
- NOLC Travel Policy
- NOLC Social Media Information
- Meeting Room Map
- Hill Visit Transportation Information
- Future AAOS Meetings
- Calendar Information

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June 2019

TO:          Board of Councilors (BOC)
            Board of Specialty Societies (BOS)

FROM:       Donna Malert, CAE
            Director, Governance

SUBJECT:    Procedures for Use at Joint BOC-BOS Business Meetings

For nearly a decade, the Board of Councilors (BOC) and the Board of Specialty Societies (BOS) have jointly conducted parts of their business meetings. Joint BOC-BOS committees now consider proposed AAOS Advisory Opinions, proposed AAOS resolutions, proposed AAOS bylaw amendments and/or proposed revisions to the AAOS Standards of Professionalism (SOPs). At the Spring 2019 NOLC, we will be considering two proposed AAOS Advisory Opinions.

Over time, certain procedural rules have developed to govern the process of considering and voting on these matters. They are attached. In summary, when it comes to the joint BOC/BOS business meeting, the BOC and the BOS hear the complete discussions on the recommendations of the Joint BOC-BOS Committees, as well as any amendments involving these recommendations. To preserve the autonomy of each group, the BOC and BOS vote separately on all amendments (if any) and on the final proposal. The final results of the voting – on both amendments and the main motions – are not to be shared until both groups have voted.

The attached document highlights the proposed process that will be used during this meeting.

Thank you for your support, and your efforts on behalf of America’s orthopaedic surgeons and their patients.
PROCESS FOR HANDLING
PROPOSED AAOS ADVISORY OPINIONS

Board of Councilors and Board of Specialty Societies

JM Marriott
Washington DC
June 5-8, 2019

Open Hearing (Friday, June 7, 2019, 9:00 - 10:00 a.m.)

The Chair of the BOC/BOS Resolutions Committee, moderates.

The Sponsors of the two proposed AAOS Advisory Opinions should be prepared to make the first remarks and address questions.

Report Drafting (Friday)

Anyone with a particularly strong interest in the outcome of the statement or wishing to be heard beyond the Open Hearing is encouraged to attend the BOC/BOS Resolutions Committee meeting.

The BOC/BOS Resolutions Committee will meet starting at 4:15 p.m. on Friday, June 7, 2019, to consider the AAOS Advisory Opinions and will then move into executive session to develop a report and recommendations on the proposed statements.

The Report of the BOC/BOS Resolutions Committee will be available electronically.

Joint BOC and BOS Business Meeting (Saturday, June 8, 2019, 10:00 - 11:00 a.m.)

Robert M. Orfaly, MD, FAAOS, BOC Chair, and Dirk H. Alander, MD, MHA, BOS Chair, will determine who will chair or may determine to jointly chair the Joint BOC/BOS Business Meeting. Donna Malert will assist the designated Chair in determining parliamentary questions.

It should be noted that there is one hour allotted for consideration of the items before the BOC and BOS – and that the following guidelines will be followed:

- There will be three microphones -- labeled #1, #2, and #3;
- After the recommendation on the proposed statement is made by the Chair of the Resolutions Committee, no second is necessary. The discussion should focus on the
Committee’s recommendation – and speakers should be prompted to indicate whether they are for or against it;

- The primary sponsor of the statement will be the first individual asked to respond to the Resolutions Committee’s recommendation. He or she should concisely provide his or her view on the Committee’s recommendation;

- Speakers should identify themselves, their state and whether they are from the BOC or BOS, and whether they are speaking in favor of or against whatever issue is on the floor;

- Speakers should be concise;

- Speakers should attempt to limit their discussion to items that have not yet been raised; and

- Speakers should not speak again until others have had the opportunity to do so.

Presentation of Reports and Recommendations

The Chair of the Resolutions Committee will present the Committee’s report and recommendation on each statement and move its adoption. No second is necessary. The discussion should focus on the Committee’s recommendation – and speakers should be prompted to indicate whether they are for or against it.

If an amendment is made, the person presenting the amendment should identify whether he or she is from the BOC or BOS. Discussion should then shift entirely to the amendment and whether it should be adopted. Members of the BOC or BOS may speak to the amendment, regardless of which group initially presented the amendment. Voting on amendments will be done via Audience Response System (ARS) with results projected immediately after the completion of the voting by both groups;

Once all amendments have been made, each body will vote on the statement as it has been amended by that body. Voting will take place Audience Response System (ARS). For all matters coming before the 2019 NOLC, voters will select from two options:

- Accept the Committee’s recommendation – as it may be amended

- Do not accept the Committee’s recommendation – as it may be amended

The ARS voting results will be projected after voting is completed by each group.
If both the BOC and the BOS both vote not to adopt a statement (as it may be amended), the matter will be considered final, and the statement will not be referred to the AAOS Board of Directors for consideration.

If there are any questions regarding these Procedures, please contact Donna Malert (malert@aaos.org) in the AAOS Executive Department.
Board of Councilors/Board of Specialty Societies
Resolutions Committee
June 7, 2019
9:00 – 10:00 a.m. (CDT)
Salon III & IV

AGENDA

Section I: AAOS Advisory Opinions

A. AAOS Advisory Opinion #1: ABOS Nomination from the BOC
   Submitted by: Alan Greenwald, MD, BOC Washington State
   1. Language of Proposed Advisory Opinion #1 ................................................. 12

B. AAOS Advisory Opinion #2: Improving Terminology Regarding Diversity
   Submitted by: Omer A. Ilahi, MD, BOC Texas
   1. Language of Proposed Advisory Opinion #2 ................................................. 13
Title: ABOS Nomination from the BOC

Submitted by: Alan Greenwald, MD, BOC Washington State
Supported by: Washington State Orthopaedic Association

WHEREAS, All academy fellows are obligated to perform a Maintenance of Certification and renew their ABOS certification every 10 years;

WHEREAS, The ABOS is an independent entity from the AAOS with regard to its leadership and fiduciary to its diplomates;

WHEREAS, The goals of the ABOS are not always in alignment with the AAOS membership;

WHEREAS, The leadership and board members are selected from nominations from the AAOS, AOA, and AMA (arguably an organization not specifically representative of all orthopedic surgeons);

WHEREAS, The BOC is aligned with the goals of the orthopedic membership at large, now therefore, be it

RESOLVED, That the ABOS accept nominations for the board of directors from BOC nominations rather than the AMA.
Title: Improving Terminology Regarding Diversity

Submitted by: Omer A. Ilahi, MD (Board of Councilors – Texas)
Supported by: Texas Orthopaedic Association (TOA)

WHEREAS, The American Academy of Orthopaedic Surgeons (AAOS) is comprised of and represents the overwhelming majority of orthopaedic surgeons in the United States;

WHEREAS, The AAOS has identified a relative lack of diversity among its membership;

WHEREAS, The AAOS understands the importance of membership diversity and inclusivity for securing the future of the medical field of orthopaedic surgery and thereby ensuring and improving access to first-rate orthopaedic care throughout the United States;

WHEREAS, This understanding has led to the AAOS encouraging increased diversity amongst orthopaedic surgeons nationally, also within the fellowship and leadership of the AAOS, and has been specifically enumerated as a Strategic Goal of the AAOS1;

WHEREAS, Progress towards achieving such goals requires accurate metrics, which, in turn, require accurate and non-prejudicial terminology;

WHEREAS, The term “Asian” is often used to refer to people of East Asian ethnicity – to the exclusion of others, including those with ancestry from South Asia, Central Asia, etc.;

WHEREAS, Any person with ethnicity stemming from the continent of Asia is de facto, and irrefutably, an Asian;

WHEREAS, A single term to refer to people from the largest, most populous, and arguably most diverse continent on the planet is inherently of limited utility due to lack of specificity, making such a term of dubious benefit when assessing populations for research, as well as for diversity metrics;

WHEREAS, Excluding half the population of Asia when using the term “Asian” to exclusively refer to those with East Asian ethnicity may be perceived as being dismissive to those excluded, and so unintentionally engender negative feelings/ill will among them; and,

WHEREAS, The AAOS actively encourages international membership and acknowledges such membership expansion efforts would be bolstered if nuances in world/regional cultural differences and attitudes are respected; now, therefore, be it

RESOLVED, That the AAOS should make it official policy to discourage the use of the word “Asian” when not referring to the entire, or at least the vast majority, of that continent or its population. Rather, whether in research, publications, meetings, and all other formats, more specific and accurate terms such as “East Asian”, “South Asian”, “Central Asian”, etc. (as is in current usage by the United Nations2) should be encouraged and employed whenever the region/population being considered is in reality limited to a specific portion of that continent.
REFERENCES


## AAOS ADVISORY OPINIONS
### AAOS BOARD ACTIONS and IMPLEMENTATION
#### Fall 2012 - Present

<table>
<thead>
<tr>
<th>DATE &amp; PLACE INTRODUCED</th>
<th>STATEMENT NUMBER</th>
<th>TITLE (as revised by the BOC, BOC/BOS)</th>
<th>SPONSOR</th>
<th>AAOS BOARD ACTION</th>
<th>IMPLEMENTATION</th>
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<tbody>
<tr>
<td>Fall 2012 Philadelphia, PA</td>
<td>BOC/BOS Advisory Opinion #1 (Submitted as Academy Resolution #1)</td>
<td>Provision of Orthopaedic Care in Rural America</td>
<td>Stephen Dow, MD and Nevada Orthopaedic Society</td>
<td>Approved recommendation to refer implementation to the Health Care Systems Committee September 21, 2013.</td>
<td>Board accepted the Health Care Systems Committee report on Rural Access to Orthopaedic Care in March 2014.</td>
</tr>
<tr>
<td>Fall 2012 Philadelphia, PA</td>
<td>Academy Resolution #2</td>
<td>Resident Work Hours</td>
<td>Andrew Schmidt, MD and Orthopaedic Trauma Association</td>
<td>Approved recommendation to send letter on behalf of Dr. Jacobs to the ACGME encouraging the ACGME to grant research exemptions from the current residency duty work restrictions and to oppose further resident duty work hour restrictions.</td>
<td>Letter sent to Mr. Timothy Goldfarb of ACGME on December 9, 2013. Add to Unified Advocacy Agenda.</td>
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<tr>
<td>Spring 2013 Washington, DC</td>
<td>BOC/BOS Advisory Opinion #1</td>
<td>AAOS Disability Guidelines for Workers’ Compensation Cases</td>
<td>Ian Crabb, MD (NE)</td>
<td>Adopted June 7, 2013. Referred to Project Team.</td>
<td>Project Team recommendations approved by Board at March 10, 2014 Board Meeting. Project Team work concluded.</td>
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<td>BOC/BOS Advisory Opinion #2</td>
<td>Inclusion of Sex and Gender Considerations in AAOS Education, Research and Quality Initiatives</td>
<td>Amy Ladd, MD (Ruth Jackson Orthopaedic Society and AAOS Women’s Health Issues Advisory Board)</td>
<td>Adopted June 7, 2013. Referred to the Women’s Health Issues Advisory Board.</td>
<td>Addressed through revised Strategic Plan.</td>
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<td>BOC/BOS Advisory Opinion #3</td>
<td>Orthopaedic Surgeon’s Loss of Economic Sustainability</td>
<td>John C. Nordt, III, MD (FL)</td>
<td>Received June 7, 2013. No action recommended.</td>
<td>No action.</td>
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<tr>
<td>Fall 2013 Austin, TX</td>
<td>BOC/BOS Advisory Opinion #1</td>
<td>Physicians Should Not Bear the Cost of ICD-10 Implementation and Usage</td>
<td>Michael Connair, MD and the Connecticut Orthopaedic Society</td>
<td>Adopted December 7, 2013. Referred to the Council on Advocacy.</td>
<td>Council on Advocacy reported back to the Board. ICD-10 implemented.</td>
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<tr>
<td>DATE &amp; PLACE INTRODUCED</td>
<td>STATEMENT NUMBER</td>
<td>TITLE (as revised by the BOC, BOC/BOS)</td>
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<tr>
<td>BOC/BOS Advisory Opinion #3</td>
<td>Required Musculoskeletal Education in Medical School: Promoting Diversity and Improving Patient Care</td>
<td>Ruth Jackson Orthopaedic Society (RJOS)</td>
<td>Discussed at Officers’ Retreat and letter sent to RJOS. Received Part B and charged the BOS, DAB and RJOS to develop a business plan to implement Part B of the Advisory Opinion.</td>
<td>Workgroup convened (Society Relations, Membership, Marketing and Residents) to explore opportunities for future programming. No business plan will be submitted for FY2015. Idea fits nicely with Education Strategy to embrace students early in their career. Ms. Jones reached out to orthopaedic shared interest groups.</td>
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<tr>
<td>Fall 2014 Nashville, TN</td>
<td>BOC/BOS Advisory Opinion #1</td>
<td>Physician-Owned Distributorships</td>
<td>Christopher Kontogianis, MD (Councilor, Washington State Orthopaedic Society)</td>
<td>Received December 6, 2014.</td>
<td>President directed the Office of General Counsel to provide a synopsis. Article appeared in AAOS Now in March 2015.</td>
</tr>
<tr>
<td>BOC/BOS Advisory Opinion #2</td>
<td>Support for Prototype Orthopaedic Value-Based Registry</td>
<td>Marc DeHart, MD (Councilor, Texas Orthopaedic Association)</td>
<td>Received December 6, 2014.</td>
<td>On-going activity through the Council on Research and Quality. CORQ is already actively investigating the topic.</td>
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<tr>
<td>BOC/BOS Advisory Opinion #3</td>
<td>AAOS Statement on the Sustainability of Independent Practice</td>
<td>Kevin Schrock, MD and Aaron Guyer, MD (Florida Orthopaedic Society)</td>
<td>Considered by both the BOC and BOS at the 2014 Fall Meeting and was not adopted by either group.</td>
<td>No further action is required.</td>
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<tr>
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<td>Spring 2015 Washington, DC</td>
<td>BOC/BOS Advisory Opinion #1</td>
<td>Request to Change the Maintenance of Certification (MOC) Process of the American Board of Orthopaedic Surgery (ABOS)</td>
<td>Basil R. Besh, MD (California Orthopaedic Association)</td>
<td>Received June 2015 and referred to the AAOS/ABOS Task Force on MOC.</td>
<td>On-going. Board Strategic Discussion held in September 2016. Board Project Team, MOC Alternative Project Team, appointed – final report was presented to the Board at its June 2017 meeting. ABOS Web-Based Longitudinal Assessment (WLA) to be rolled out in 2019. AAOS continues to work with the ABOS to communicate this new initiative.</td>
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<tr>
<td>BOC/BOS Advisory Opinion #2</td>
<td>Use of the AAOS Clinical Practice Guidelines (CPG) Methodology to Assess the Recertification and Maintenance of Certification (MOC) Processes of the ABOS</td>
<td>Omer Ilahi, MD (Texas Orthopaedic Association)</td>
<td>Received June 2015 and referred to the AAOS/ABOS Task Force on MOC.</td>
<td>AAOS/ABOS Task Force on MOC discussed at its April 21, 2016 teleconference. Methodology not applicable to MOC.</td>
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<tr>
<td>BOC/BOS Advisory Opinion #4</td>
<td>Equity in Graduate Medical Education (GME Funding)</td>
<td>Michael Aronow, MD and Steven Neufeld, MD (American Orthopaedic Foot &amp; Ankle Society)</td>
<td>Adopted and referred to the Council on Advocacy.</td>
<td>Equity in Graduate Medical Education (GME Funding) was introduced by the AAOS delegation at the AMA House of Delegates November 2015 meeting and was approved by the House of Delegates as AMA Policy.</td>
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<tr>
<td>Fall 2015 Denver, CO</td>
<td>BOC/BOS Advisory Opinion #6</td>
<td>Concerns about Sustainable Growth Rate (SGR) Repeal Bills</td>
<td>Lawrence Halperin, MD (BOC Chair-Elect) and others.</td>
<td>Withdrawn at the request of the sponsors.</td>
<td>No further action required.</td>
</tr>
<tr>
<td>Fall 2015 Denver, CO</td>
<td>BOC/BOS Advisory Opinion #1</td>
<td>Increase Class Size and Enhance State Opportunities of the AAOS Leadership Fellows Program (LFP)</td>
<td>Ronald Navarro, MD (Councilor, California Orthopaedic Association)</td>
<td>Received December 2015 and referred to the Leadership Development Committee.</td>
<td>Leadership Development Committee report to Board of Directors in May 2016. Board approved Leadership Development Committee recommendation to maintain current size of the LFP.</td>
</tr>
<tr>
<td>Spring 2016 Washington, DC</td>
<td>BOC/BOS Advisory Opinion #1</td>
<td>Request for Legislative Relief Regarding Physician Ownership of Hospitals</td>
<td>Rory Wright, MD and the Wisconsin Orthopaedic Society</td>
<td>Received May 2016 and referred to the Council on Advocacy.</td>
<td>Aggressive legislative outreach program/strategy with PHA and key Hill contacts including PAC events with targeted Members of Congress. Fly-in and Congressional staff briefing held December 2016.</td>
</tr>
<tr>
<td>Spring 2016 Washington, DC</td>
<td>BOC/BOS Advisory Opinion #2</td>
<td>AAOS Accreditation of Orthopaedic Surgical Facilities</td>
<td>Stephen Eckrich, MD and the South Dakota Orthopaedic Society</td>
<td>Received May 2016.</td>
<td>No further action required.</td>
</tr>
<tr>
<td>BOC/BOS Advisory Opinion #3</td>
<td>Continued Execution of the AAOS Annual Meeting Playground Build</td>
<td>James Slough, MD and the New York State Society of Orthopaedic Surgeons</td>
<td>Received May 2016 and referred to the Communications Cabinet.</td>
<td>Communications created a viable alternative community project – Communities in Motion – that was piloted at the 2017 Annual Meeting in San Diego. Academy Resolution #1: Continuing the Annual Enduring Community Project at the AAOS Annual Meeting was considered at the 2016 Fall Meeting. Resolution voted down by the BOC, BOS and Board of Directors. No further action.</td>
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<td>Fall 2016 Rosemont, IL</td>
<td>BOC/BOS Advisory Opinion #1</td>
<td>AAOS Support of CMS Removing Total Joint Replacement (TJR) from Inpatient Only List</td>
<td>Richard Biama, MD; Kent Adamson, MD; Basil Besh, MD; Paul Braaton, MD; Michael Klassen, MD; Ronald Navarro, MD; Dori Neill-Cage, MD; Ronald Wyatt, MD (California BOC)</td>
<td>Received December 2016 – Referred to Office of Government Relations and Council on Advocacy to draft report to share with the BOC and BOS and report at the 2017 NOLC.</td>
<td>AAOS comment letter sent to CMS on August 30, 2017. AAOS supports the removal of TKA from the IPO list contingent upon several issues. No further action.</td>
</tr>
<tr>
<td>BOC/BOS Advisory Opinion #4</td>
<td>Development of an Alternative Pathway for Maintenance of Certification (MOC)</td>
<td>Kevin Shrock, MD and the Florida Orthopaedic Society</td>
<td>Received May 2016 – to be discussed at future Board meeting.</td>
<td>Strategic Discussion held at the September 2016 Board of Director’s meeting. Next steps included appointment of Board Project Team on MOC. Final report presented to the Board at its June 2017 meeting. ABOS Web-Based Longitudinal Assessment (WLA) to be rolled out in 2019. AAOS continues to work with the ABOS to communicate this new initiative.</td>
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<tr>
<td>BOC/BOS Advisory Opinion #5</td>
<td>Preservation of the AAOS Congressional Key Contact Program and Advocacy Resource Committee</td>
<td>Lawrence S. Halperin, MD, BOC Chair; Daniel K. Guy, MD, BOC Chair-Elect; and Basil R. Besh, MD, BOC Secretary</td>
<td>Adopted May 2016.</td>
<td>BOC Advocacy Resource Committee established. Ambassadors recruited for Key Contact Program. Increased participation from 60 to 140 members.</td>
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<tr>
<td>BOC/BOS Advisory Opinion #6</td>
<td>Enhanced Awareness of the AAOS Board of Councilors (BOC) and Board of Specialty Societies (BOS)</td>
<td>David I. Cannon, MD (Tennessee Orthopaedic Society), and Basil R. Besh, MD (California Orthopaedic Society)</td>
<td>Adopted May 2016.</td>
<td>BOC: Awareness booth at Annual Meeting; video created for state societies; information included in AAOS member welcome packet. BOS: Updated web pages; template reports for inclusion in society newsletters; information included in AAOS member welcome packet. Awareness efforts continue for the BOC and BOS.</td>
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<td>BOC/BOS Advisory Opinion #2</td>
<td>Request for Project Team on Orthopaedic Occupational Injuries</td>
<td>Ronald Wyatt, MD (California Orthopaedic Society)</td>
<td>Received December 2016 – Referred to the Patient Safety Committee.</td>
<td>Patient Safety Committee, Healthcare Systems Committee and Membership and Leader Development Committee to review and provide feedback. On-going.</td>
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<tr>
<td>Spring 2017 Washington, DC</td>
<td>BOC/BOS Advisory Opinion #1</td>
<td>Recommend AAOS endorsement of AAHKS Position Statement on the Need for Research on Pre- and Post-Operative Antibiotics</td>
<td>Adolph Yates, MD (AAHKS)</td>
<td>Adopted June 2017.</td>
<td>AAOS to endorse AAHKS position statement to seek further research on the use of pre-operative antibiotics.</td>
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<tr>
<td>BOC/BOS Advisory Opinion #2</td>
<td>AAOS Efforts to Abolish Maintenance of Certification (MOC) Recertification and Establishment of Alternate Forms of Proficiency.</td>
<td>Robert R. Slater, Jr., MD (Western Orthopaedic Association) and Bryan S. Moon, MD (Texas BOC)</td>
<td>Adopted June 2017.</td>
<td>MOC Alternative Project Team, appointed – final report presented to the Board at its June 2017 meeting. Recommendations have also been shared with the ABOS. ABOS Web-Based Longitudinal Assessment (WLA) to be rolled out in 2019. AAOS continues to work with the ABOS to communicate this new initiative. Ongoing discussions continue with ABOS.</td>
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<td>BOC/BOS Advisory Opinion #3</td>
<td>Evaluation, Reassessment and Modification of AAOS Development of Clinical Practice Guidelines (CPGs), Appropriate Use Criteria (AUCs) and Performance Measures (PMs) Policies and the Possible Elimination of CPGs and AUCs</td>
<td>David L. Cannon, MD, MBA (Tennessee BOC)</td>
<td>Received June 2017.</td>
<td>No further action required.</td>
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<tr>
<td>BOC/BOS Advisory Opinion #4</td>
<td>Support for Schedule of BOC/BOS Meetings at Roughly Four Month Intervals</td>
<td>Thomas Muzzonigro, MD and Joshua Port, MD (Pennsylvania BOC); Christopher Kontogianis, MD (Washington BOC); Jeffery Angel, MD (Arkansas BOC); Nick DiGiovine, MD (Montana BOC); Rory Wright, MD (Wisconsin BOC)</td>
<td>BOC/BOS did not adopt.</td>
<td>No further action required.</td>
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<td>BOC/BOS Advisory Opinion #5</td>
<td>Support for the Role and Value of State Orthopaedic Societies</td>
<td>James Slough, MD and Claudette Lajam, MD (New York State Society of Orthopaedic Surgeons) (Pennsylvania BOC)</td>
<td></td>
<td>Adopted June 2017.</td>
<td>Referred to the Department of Society Relations to implement a monthly column in AAOS Now to highlight State Orthopaedic Societies achievements and activities.</td>
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<tr>
<td>BOC/BOS Advisory Opinion #6</td>
<td>Centralization and Support of Affiliate Mentoring Programs</td>
<td>Alexandra E. Page, MD and Julie Samora, MD (RJOS Representatives to BOS)</td>
<td></td>
<td>Received June 2017.</td>
<td>The AAOS and BOS are implementing a three-year pilot plan to formalize the relationships with medical students through Orthopaedic Specialty Interest Groups (OSIGs).</td>
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<tr>
<td>BOC/BOS Advisory Opinion #7</td>
<td>Support of Orthopaedic Resident/Fellow Engagement at Board of Councilors and Board of Specialty Societies Meetings</td>
<td>Thomas Muzzonigro, MD, Gregory Gallant, MD and Joshua Port, MD (Pennsylvania BOC); Christopher Kontogianis, MD (Washington BOC); Jeffery Angel, MD (Arkansas BOC); Nick DiGiovine, MD (Montana BOC); Rory Wright, MD (Wisconsin BOC)</td>
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<td>Received June 2017.</td>
<td>Referred to the Finance Committee for evaluation of the pilot program and recommend to the BOC and BOS if support should be continued.</td>
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<tr>
<td>BOC/BOS Advisory Opinion #8</td>
<td>Resident Assembly Representation on the AAOS Board of Directors</td>
<td>Susan Williams, MD (Oregon BOC); Thomas Muzzonigro, MD (Pennsylvania BOC); Jeffery Angel, MD (Arkansas BOC); Alexandra Page, MD (ROSS Representative to BOS)</td>
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<td>Received June 2017.</td>
<td>Resident Assembly and orthopaedic residency program directors and chairs to explore opportunities for Resident Assembly members to be fully engaged in the life of the AAOS.</td>
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<td>Fall 2017, Dallas, TX</td>
<td>BOC/BOS</td>
<td>Specialty Society Invited Symposia at the AAOS Annual Meeting</td>
<td>Steve K. Lee, MD (ASSH); Ghazi Rayan, MD (ASSH); Jeffrey A. Greenberg (BOS Rep-ASSH)</td>
<td>Accepted December 2017. Referred to the AAOS Central Program Committee</td>
<td>Central Program Committee recommendation was considered by Board of Directors at March 2018 Board meeting. Central Program Committee recommended that current protocol in place provides sufficient mechanism for specialty society symposia at the Annual Meeting and no further change is needed. The Board approved the Central Program Committee recommendation. No further action.</td>
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<tr>
<td>Spring 2018, Washington, DC</td>
<td>BOC/BOS Advisory Opinion #1</td>
<td>The AAOS Should Consider Utilizing the AJRR Surgeon Specific Data to Allow for Voluntary Public Reporting</td>
<td>Adolph J. Yates, Jr., MD (AAHKS)</td>
<td>Received June 2018. Referred to AJRR.</td>
<td>On-going – AJRR to provide update.</td>
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<td>BOC/BOS Advisory Opinion #2</td>
<td>The AAOS Should Consider Utilizing the Grading of Recommendations, Assessment, Development and Evaluations (GRADE) Methodology to Prepare Clinical Practice Guidelines</td>
<td>Adolph J. Yates, Jr., MD (AAHKS)</td>
<td>WITHDRAWN – No further action required.</td>
<td>No further action.</td>
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<td>BOC/BOS Advisory Opinion #3</td>
<td>The AAOS Should Consider Revision of Current Conflict of Interest Guidelines as Applied to Service on the AAOS Board of Directors</td>
<td>Adolph J. Yates, Jr., MD (AAHKS)</td>
<td>WITHDRAWN – No further action required.</td>
<td>No further action.</td>
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<td>BOC/BOS Advisory Opinion #4</td>
<td>Opposition to the Recognition of the Shoulder as One Anatomic Site</td>
<td>Anthony E. Romeo, MD (ASES); Charles Bush-Joseph, MD (AOSSM); Robert E. Hunter, MD (AANA)</td>
<td>Received June 2018. Referred to the OGR.</td>
<td>On-going – update forthcoming.</td>
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<td>BOC/BOS Advisory Opinion #5</td>
<td>Position Statement on Firearm Injury</td>
<td>Florida Orthopaedic Society</td>
<td>Received June 2018. Referred to the Communications Cabinet.</td>
<td>Patient Safety Committee and Communications Cabinet developing draft statement for consideration. On-going. Board of Directors to consider statement on firearms safety at its June 2019 Board Meeting.</td>
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<td>BOC/BOS Advisory Opinion #6</td>
<td>AAOS Opposition to Decreased Payment for Medicare Services</td>
<td>Florida Orthopaedic Society</td>
<td>Received June 2018. Referred to the OGR.</td>
<td>On-going – update forthcoming.</td>
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<tr>
<td>BOC/BOS Advisory Opinion #7</td>
<td>Support for Repeal of MACRA/MIPS</td>
<td>Florida Orthopaedic Society</td>
<td>Received June 2018. Referred to the OGR.</td>
<td>On-going – update forthcoming.</td>
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<td>BOC/BOS Advisory Opinion #9</td>
<td>Inclusion of Methadone in Prescription Drug Monitoring Databases (PDMPs)</td>
<td>David L. Cannon, MD, MBA</td>
<td>Received June 2018. Referred to the Patient Safety Committee and the OGR.</td>
<td>On-going – update forthcoming.</td>
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<tr>
<td>BOC/BOS Advisory Opinion #10</td>
<td>Expansion of Resources for Hospital Employed Orthopaedic Surgeons</td>
<td>Jeffery D. Angel, MD and David L. Cannon, MD, MBA</td>
<td>Resolved A: Received June 2018. Referred to the Council on Education and the Office of General Counsel. Resolved B: Received June 2018. Referred to the Office of General Counsel.</td>
<td>Symposium to be held at 2018 Fall Meeting.</td>
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<tr>
<td>AAOS Advisory Opinion #1</td>
<td>The AAOS should consider revision of the current conflicts of interest guidelines as applied to service on the AAOS Board of Directors.</td>
<td>Julie Samora, MD; Adolph J. Yates, MD; David Polly, MD; Hassan Mir, MD; Antonia Chen, MD; Eeric Truumees, MD</td>
<td>Received and referred to the Committee on Ethics and Outside Interests to revise Guidance Document based on feedback from the Board of Directors.</td>
<td>Board of Directors considered and revisions to Guidance Document in April 2019. Communication distributed to BOS COI Task Force.</td>
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<td>AAOS Advisory Opinion #2</td>
<td>The AAOS should consider clarification and standardization of the process for creation of Plans for Active Management (PAMs)</td>
<td>Adolph J. Yates, MD; Julie Samora, MD; David Polly, MD; Antonia Chen, MD; Hassan Mir, MD; Eeric Truumees, MD</td>
<td>Received and referred to the Committee on Ethics and Outside Interests.</td>
<td>Committee on Ethics and Outside Interests documented the PAM process. Communication distributed to BOS COI Task Force.</td>
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<td>AAOS Advisory Opinion #3</td>
<td>Disaster Preparedness</td>
<td>Daniel K. Guy, MD; Roman Hayda, MD; Pablo Marrero, MD; Andrew N. Pollak, MD; Jennifer M. Weiss, MD; David Teague, MD; and David D. Teuscher, MD</td>
<td>Received.</td>
<td>President’s Symposium at 2019 Annual Meeting focused on Disaster Preparedness. Disaster Preparedness kiosk information will be uploaded to education platform for availability at all meetings.</td>
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Updated: May 2019
Symposium III: Core Values

The session will be utilized to roll out the new Core Values for the AAOS and educate attendees on the process used to develop the values.

**Moderators:**
James R. Ficke, MD
Wayne A. Johnson, MD;
Kevin D. Plancher, MD, MPH, MS

**Staff Liaisons:**
Donna J. Malert, CAE, Director, Governance
Todd Applebaum, MBA, Director, Strategic Planning and Performance Management
James R. Ficke, MD is the Robert A. Robinson Professor and Chairman of the Department of Orthopaedic Surgery at The Johns Hopkins School of Medicine. He has an active academic and clinical practice in Orthopaedic Foot and Ankle, and Trauma. Dr. Ficke completed his BS degree in Engineering at West Point; MD at Uniformed Services University; and residency in Orthopaedic Surgery at Tripler Army Medical Center in Honolulu. He completed an AO fellowship in trauma in Munich Germany, and foot and ankle in Dallas Texas. Dr. Ficke served 30 years in the United States Army, his last military assignment was Chairman of the Department of Orthopaedics and Rehabilitation at San Antonio Military Medical Center and also served the U.S. Army Surgeon General as the senior advisor for Orthopaedic. While on Active Duty, he deployed to Iraq and also served as the Chief of Staff for the Surgeon General’s Dismounted Complex Blast Injury Task Force. He served as Chair or Co-chair of the Steering Committee for the DoD Peer Reviewed Orthopaedic Research Program for eight years. He is currently a mentor for the Leadership Fellows Program. In 2016, he was the Program Chair for the AAOS Annual Meeting.

Wayne A. Johnson, M.D., FAAOS, FACS is a highly respected member of the Lawton- Fort Sill, Oklahoma Community, where he has practiced orthopaedic surgery for the past 16 years. He is an arthroscopist with extensive experience with knee and shoulder arthroscopic surgery for the past 20 years. Dr. Johnson completed his BS degree in Chemistry from Howard University and his medical degree from Meharry Medical College. He completed his orthopaedic surgery residency at the University of Colorado, where he served as the chief resident of his residency program and the Denver Children’s Hospital. He also has completed a mini-postgraduate fellowship in Orthopaedic Trauma Surgery (2002) at the University of Miami’s, Ryder Trauma Center and has a subspecialty interest in sports medicine.

Dr. Wayne A. Johnson, MD is a former US Army Lieutenant Colonel and has completed 21 years of combined service in the United States Army (1980-1991: U.S. Army Reserves, 1991-2003: U.S. Army Active Duty). He currently is an Assistant Clinical Professor of the University of Oklahoma Family Medicine Residency program in Southwest
Oklahoma. He has served as the President of the Oklahoma state Orthopaedic society for six years, Former President and Vice-President of the Mid-central states regional Orthopaedic society, and the Cameron University Foundation board of directors for 8 years where he has served as the President and Vice president. He has served as an Oral Board examiner for the American Board of Orthopaedic Surgery, written board examiner for the American Board of Orthopaedic Surgery.

Dr. Johnson has a passion for volunteering and giving back to his profession. Dr. Johnson is a member of the American Academy of Orthopaedic Surgeons Board of Councilors, where he is the current BOC Secretary. He is also a member of the Board of Directors and Council on Research and Quality. He is also a former AAOS Communications Cabinet, Coding and Reimbursement Committee, and the Diversity Advisory Board and has served as an editor for AAOS Now. Dr. Johnson has served in many leadership roles in his local medical community to include the Southwestern Medical Center Chief of Surgery, Chairman of the Board of the Ambulatory Surgical Center Board, Chief of Orthopaedics, and the Hospital Physicians Leadership Group. He has been a board member for the Great Plains Technology Center Biomedical Sciences Committee and as a Medical School Admissions Committee member for the University of Oklahoma Medical School.

Kevin D. Plancher, MD, MPH is a Clinical Professor in Orthopaedics at Albert Einstein College of Medicine in New York. He is the Fellowship Director for an ACGME-accredited sports medicine fellowship. He earned his Bachelor's degree in chemistry and biochemistry from Trinity College in Hartford, CT. He then went on to earn his Master's in Science in Physiology and Doctorate in Medicine from Georgetown University in Washington, DC. Dr. Plancher completed his residency at Harvard University's Combined Orthopaedic program. He then went on to complete two post-graduate fellowships, one in hand and microvascular surgery (The Indiana Hand Center) and the other in sports medicine and reconstruction of the shoulder and knee (The Steadman Hawkins Clinic). Most recently, he completed his MPH at Columbia University Mailman School of Public Health. He is honored to serve on the AAOS Board of Directors with his recent appointment as BOS Secretary.
AAOS Core Values

Leading to serve
1. We relentlessly focus on enabling our profession to better serve our patients
2. We mentor and support our members to drive excellence in musculoskeletal health
3. We engage members, partners, and patients where they are, and lead them forward
4. We practice transparent decision-making and open communication

Shaping our future
1. We use data and evidence to stay a step ahead
2. We advocate to promote quality musculoskeletal care
3. We proactively embrace disruptors, and develop innovative products and services

Excellence together
1. We empower and seek input from all people, not just the majority
2. We acknowledge unconscious biases, and seek to address barriers to inclusion
3. We collaborate based on mutual respect and trust

Approved 5-20-19
Biography of the Deputy Surgeon General
Rear Admiral Erica G. Schwartz, M.D., J.D., M.P.H.

As Deputy Surgeon General, Rear Admiral (RADM) Erica G. Schwartz advises and supports the Surgeon General regarding operations of the U.S. Public Health Service (USPHS) Commissioned Corps and in communicating the best available scientific information to advance the health of the nation.

RADM Schwartz recently served as the Director of Health, Safety and Work-Life where she was responsible for the Coast Guard's health care system of 42 clinics and 150 sick bays, as well as the Coast Guard’s environmental health and safety program. RADM Schwartz oversaw the Coast Guard's child care programs and food services delivery programs, and the Coast Guard's Sexual Assault Prevention, Response and Recovery, Family Advocacy, Suicide Prevention, Substance Abuse Prevention, Transition Assistance, Personal Financial Management, Special Needs, Health Promotion and Ombudsman programs.

RADM Schwartz is trained and Board Certified in Preventive Medicine (Occupational Medicine). RADM Schwartz graduated with a Bachelor of Science degree in Biomedical Engineering from Brown University in 1994 and received her Doctor of Medicine degree from Brown University School of Medicine in 1998. In 2000, she completed her Master of Public Health (MPH) degree with a dual concentration in Health Services Administration and Occupational and Environmental Medicine from the Uniformed Services University of the Health Sciences (USUHS). In 2001, she completed the USUHS Occupational and Environmental Medicine residency program. RADM Schwartz also has a Juris Doctorate from the University of Maryland and is admitted to the District of Columbia Bar.

Preceding her transfer to the USPHS Commissioned Corps and Coast Guard in 2005, she served as a Navy Occupational Medicine physician. Her assignments included serving as the Chief of the Occupational Medicine Clinic and the Immunization Clinic and serving as the Preventive Medicine Department Head at the Naval Medical Clinic in Annapolis, MD. She also served as an Occupational Medicine physician and clinical epidemiologist at the Navy and Marine Corps Public Health Center (formerly known as the Navy Environmental Health Center) in Portsmouth, VA.

RADM Schwartz served as the Chief of Health Services and the Coast Guard’s Preventive Medicine Chief in the Operational Medicine and Medical Readiness Division at Coast Guard Headquarters in Washington, DC. As an expert in health care policy, she wrote critical force health protection policies for the Coast Guard and developed force health protection guidance for numerous contingency operations, to include Hurricanes Katrina and Rita, the 2009 H1N1 pandemic, Operation Unified Response (2010 Haiti earthquake), the Deepwater Horizon Operation, and the most recent Ebola outbreak in West Africa. RADM Schwartz served as the Coast Guard’s principal expert on pandemic influenza – hand-picked as the medical consultant for the DHS Pandemic Influenza Principal Federal Official.

RADM Schwartz’s awards and decorations include one Legion of Merit, two Meritorious Service Medals, Coast Guard and Navy Commendation Medals, and many other personal and unit awards. She was recognized by the Assistant Secretary of Defense for Health Affairs by being honored as one of the Military Health System Female Physicians of the Year.
Symposium II: Advocacy

This symposium will focus on AAOS advocacy. The symposium will be led by Dr. Wilford Gibson, Chair of the AAOS Council on Advocacy. It will allow an opportunity to engage the attendees in providing feedback on key advocacy initiatives that may further shape the regulatory and legislative efforts of the AAOS. There will be brief updates on legislation, the American Medical Association (AMA) Relative-value Update Committee (RUC), and the Political Action Committee of the AAOS. This will be followed by breakout sessions designed to get input from our members on key issues. The breakout groups will report back to the full group to discuss, prioritize and incorporate ideas into our advocacy and quality efforts moving forward.

**Moderator:**
Wilford K. Gibson, MD

**Speakers:**
*Legislative Update* – Wilford K. Gibson, MD  
*AMA Relative-value Update Committee (RUC) Update* – M. Bradford Henley, MD, MBA, FACS  
*PAC Update* - John T. Gill, MD

**Breakout Groups**
1. Quality and Access to Specialty Care
2. Payment Issues
3. Other Topics missing from our Unified Advocacy Agenda
Wilford K. Gibson, MD, FACS, FAAOS

In 2015, Dr. Gibson received the Virginia Orthopaedic Society Career Award. Read more here.

A proud Virginia native, Dr. Gibson graduated Cum Laude with a Bachelor of Science degree from the University of Richmond. His passion for sports and sports medicine began in Richmond, as he competed on a national and international level in the 110 and 400 meter hurdles and various sprint relays for the University. After graduation he was awarded an Armed Forces scholarship to attend the Medical College of Virginia School of Medicine, where he graduated in the top of his class. Upon receiving his MD, he was commissioned in the US Navy and completed an Internship in General Surgery. Serving on the USS Nassau (LHA-4) for Caribbean, Mediterranean and Middle East deployments, Dr. Gibson received personal awards including the Navy Commendation Medal, National Defense Service Medal and various unit commendations. Upon his return he completed his orthopaedic surgery residency at Naval Medical Center Portsmouth, Virginia, serving as chief resident during his final year. He pursued additional fellowship training in Orthopaedic Trauma at Tampa General Hospital and Pelvis and Acetabulum (Hip) Reconstruction at Los Angeles County and Good Samaritan Hospitals. He subsequently led the orthopaedic trauma service at Naval Medical Center Portsmouth. After his honorable discharge, Dr. Gibson began his civilian practice at Eastern Virginia Medical School and Atlantic Orthopaedic Specialists where he began his practice of orthopaedic hip, knee and shoulder reconstruction and replacement and orthopaedic sports medicine. He is a Team Physician for Old Dominion University. Dr. Gibson is active in leadership of the Virginia Orthopaedic Society and the American Academy of Orthopaedic Surgeons (AAOS). He has published in peer reviewed journals and has special interest in minimally invasive joint replacement and preservation, including the popular direct anterior hip replacement or “jiffy hip.” Dr. Gibson is board certified by the American Board of Orthopaedic Surgery in Orthopaedic Surgery and Orthopaedic Sports Medicine. Second only to the satisfaction of service and treatment of his patients, Dr. Gibson’s greatest professional achievement has been his election to Secretary on the Board of Councilors of AAOS and progression to Chair elect and Chair of this organization that is the deliberative body of the AAOS representing orthopaedic surgeons in all states, regional societies, Puerto Rico, US Territories, Canada and the US Military. Personally, Dr. Gibson lists his lifetime achievement as being able to convince his lovely wife to marry him over 25 years ago.

Learn more about Dr. Gibson’s accomplishments in the fields of hip pain relief and joint replacement.
M. Bradford Henley, MD, MBA received his Doctor of Medicine Degree with honors, from the University of Washington in 1979. After a residency in Orthopaedic Surgery at the University of Texas Southwestern Health Science Center in Dallas (UTSCD), he worked with Dr. Bernd Claudi at the Technical University of Munich, in a post doctoral fellowship in Orthopaedic Traumatology and Reconstructive Orthopaedics. Currently, he is a Professor of Orthopaedic Surgery and Sports Medicine practicing Orthopaedic Traumatology and post-traumatic reconstructive surgery at Harborview, the only Level I Trauma Center serving the Pacific Northwest.

In addition to the practice of medicine, Dr. Henley has more than 30 years of experience in coding and practice management. In 1995, he received a Masters in Business Administration degree from the University of Washington. He uses his experience and expertise as a practice management consultant. He has held multiple committee and administrative positions at the University of Washington and its affiliated institutions. Nationally, Dr. Henley is a member and volunteer in numerous professional societies including the AAOS, AOA, ACS, OTA, COS, WOA, and MGMA. He has been active in many of these having served, for example, as Treasurer of the AAOS, on the Board of Directors of the AAOS, as Chairman of the Board of Specialty Societies, as the Treasurer and President of the Orthopaedic Trauma Association. He also served two 4-year terms on the AMA’s CPT Editorial Panel, having served on the CPT Advisory Panel for more than a decade. Currently, Dr. Henley serves as the Chairman of the American Association of Orthopaedics Surgeon’s (AAOS) Committee on Coding and Reimbursement.

Dr. Henley is frequently invited to be a guest speaker or visiting professor as he is recognized for his contributions to the orthopaedic peer reviewed literature and to practice management education. He has been a faculty member of numerous regional and national CME courses and he is usually asked to speak on topics pertaining to both musculoskeletal injury treatment and practice management. He continues to be a contributing editor to numerous AAOS publications and coding tools including Code-X, the Global Service Data for Orthopaedic Surgeons, and the CPT-ICD9 Cross Reference.

John T. Gill, MD is an orthopaedic surgeon with Dallas Sports Medicine Specialists. After graduating from University of Texas Southwestern Medical School in Dallas, Texas, Dr. Grill completed his residency at the at UT Southwestern and Affiliated Hospitals, and a sports medicine fellowship at Baylor College of Medicine.

Dr. Gill has been a strong advocate for the orthopaedic profession for the past 17 years, at both the state level in his home state of Texas, and at the federal level. He currently serves as the Chair of the Political Action Committee (PAC) of the AAOS. He has previously served on the AAOS Board of Directors, Nominating Committee, Board of Councilors, Council on Advocacy, and the Council on Research and Quality. Dr. Gill has also served as a member of the American Orthopaedic Association, American Medical Association, Texas Medical Association, Texas Orthopaedic Association, and Dallas County Medical Society.
Symposium III: Leadership

Symposium attendees will have the opportunity to engage in discussion and learn about leadership initiatives for the AAOS.

**Moderator:**
Joseph A. Bosco, III, MD, First Vice President

**Speakers:**
Dirk H. Alander, MD, MHA – BOS Chair
Robert M. Orfaly, MD – BOC Chair
Thomas Barber, MD- Former Chair Council on Advocacy

**Staff Liaisons:**
Donna J. Malert, CAE, Director, Governance
Todd Applebaum, MBA, Director, Strategic Planning and Performance Management

**Agenda**
1) 3:15-3:10 Introduction and Welcome – Joseph A. Bosco, III, MD
2) 3:10-3:20 From the Congo to the AAOS: Lesson Learned Along the Way – Dirk H. Alander, MD, MHA
3) 3:20-3:30 My Path Towards Leadership Enlightenment – Robert M. Orfaly, MD
4) 3:30-3:40 Organizational Leadership- This Ain’t Your OR – Thomas Barber, MD
5) 3:50-4:00 Feedback from audience – survey questions.
   a. Does the AAOS offer the appropriate educational tools and resources to support new volunteer leaders?
   b. What competencies are needed in Academy leaders? (use Word Cloud)
   c. Is the NOLC structured as a useful leadership event?
   d. Are you interested in leadership resources through the Academy’s learning platform?
   e. Does the Academy orient its volunteers to be strategic?
   f. What leadership training tools would be most useful to you as an AAOS volunteer?
6) 4:00-4:15 Open Mic session
Symposium III: Speaker Biographies

Joseph A. Bosco, III, MD is Vice Chairman for Clinical Affairs of the NYU Langone Department of Orthopedic Surgery, and Professor of Orthopedic Surgery at New York University School of Medicine. Dr. Bosco has served as team physician for the Durham Bulls and Brooklyn Cyclones minor league baseball teams. From 2002 until 2004, he was a team physician for the New York Mets professional baseball team. He is a member of and held leadership positions in numerous professional societies, including The American Orthopedic Society for Sports Medicine (former member Board of Councilors), The American Orthopedic Association, The American Academy of Orthopedic Surgery (Former BOD member and presently Chair of the Annual Meeting Committee), The New York Academy of Medicine, The Eastern Orthopedic Association and the New York State Society of Orthopedic Surgeons (currently Vice President). He is the immediate past president of the BOD of The Orthopaedic Learning Center and served on the BOD of The Association of Professionals in Infection Control. He was chosen to, and completed, the prestigious American Academy of Orthopedic Surgeons Leadership Fellows Program.

Dr. Bosco has published and lectured, both nationally and internationally, on Alternative Payment Models and healthcare policy.

Thomas C. Barber, MD, is San Francisco, CA orthopaedic surgeon specializing in total joint replacement. Dr. Barber is a Professor of Clinical Orthopedic Surgery at University of California at San Francisco and serves as Vice President of PeriOperative Services.

Dr. Barber served as chair of the American Academy of Orthopaedic Surgeons’ (AAOS) Council on Advocacy from 2013-2107. He has long been active in the Academy, serving as the chair of the Board of Councilors in 2010; as an AAOS Board member from 2007 to 2010; and as a Prevention of Medical Errors Committee. He has also been a board member of the American Joint Replacement Registry (AJRR).
Dr. Barber received a bachelor’s degree in economics from Harvard, and a medical degree from the University of Rochester School of Medicine. He completed an internship in general surgery at the University of Rochester, and his residency in orthopaedic surgery at Boston University.

At Kaiser Permanente, Dr. Barber helped launch the Kaiser Permanente Total Joint Registry, for which he received the organization’s Vohs Quality Award. The registry effort was awarded the Eisenberg ward from the Joint Commission. He also chaired the Kaiser Permanente CyberKaiser Development Team which pioneered patient to physician messaging in the Kaiser system.

Dirk H. Alander, MD, MHA, FACS is Chief of Quality, Musculoskeletal Institute, Department of Orthopaedic Surgery and Professor of Orthopaedic surgery at Geisinger Commonwealth School of Medicine. He is a spine surgery attending at Geisinger Medical Center in Danville, Pa. His clinical interests include degenerative and traumatic spine disorders, minimally-invasive surgery techniques, patient safety, and health care delivery systems. Dr. Alander earned his medical degree from the University of Illinois at Rockford. He completed his residency at Grand Rapids Orthopaedic Training Program Grand Rapids, Mich., and a fellowship in spine surgery and spinal cord rehabilitation at Southern Illinois University in Carbondale. He also received his Master’s in Health Administration from Saint Louis University in 2017.

Dr. Alander has served on numerous AAOS committees and councils, including the Political Action Committee, Council on Advocacy and the BOS, where he most recently served as secretary and chair-elect. He is a past Chair of the Membership Committee. He also held several roles at the American Spinal Injury Association (ASIA) and served on the boards of directors of ASIA and the Cervical Spine Research Society. He has traveled to multiple locations in China, Central Asia and Africa providing both educational and clinical experience at medical institutions and residency training programs.

Robert M. Orfaly, MD, FRCS(C) is an associate professor in the Department of Orthopaedics & Rehabilitation at Oregon Health and Science University. His areas of interest include shoulder arthroplasty, rotator cuff disorders, upper extremity trauma, shoulder biomechanics, and orthopaedic implant design. Dr. Orfaly received his medical degree from McGill University in Montreal, Canada. He completed his residency in orthopaedic surgery at the University of British Columbia, followed by fellowships in hand and upper extremity surgery at the University of British Columbia and shoulder surgery at the University of Texas Health Science Center in San Antonio.

Dr. Orfaly also assumes chair of the AAOS Membership and Leadership Development Committee this year. He was elected to the position of Board of Councilors Secretary two years ago and
has been an active volunteer with the Academy for more than a decade. He served on the Communications Cabinet and participated in the Leadership Fellows Program and was a previous member of the Shoulder and Elbow Evaluation Committee and the Trauma Program Committee. Additionally, he was the recipient of the AAOS Distinguished Volunteer Service Awards in 2010 and 2013.

Dr. Orfaly is a past-president of the Oregon Medical Association and the Oregon Association of Orthopaedic Surgeons and served as a member of the American Medical Association Orthopaedic Section Executive Committee.
Symposium IV: Quality and Value

The symposium will include a short presentation highlighting the shift to value-based healthcare and how we can prepare our members to thrive in this system by Robert H Quinn, MD, chair of the Council on Research and Quality. Following the presentation, the audience will be asked to participate in breakout sessions to collect feedback on how they define “value” in value-based healthcare, their top five concerns regarding the shift, and input on how AAOS can help its members thrive in this setting.

**Speaker:**
*Value-based Healthcare: At the Table or on the Menu - Robert H. Quinn, MD*

**Breakout Discussions**

**Discussion Leaders:**
Dirk H. Alander, MD; Jacob M. Buchowski, MD, MS; Wayne A. Johnson, MD; Robert M. Orfaly, MD; Kevin D. Plancher, MD, MPH, MS; C. Craig Satterlee, MD; and Laura Lowe Tosi, MD

**Discussion Questions:**
1. In your opinion, “value-based care” should be defined as __.
2. Regarding the shift from service-based care to value-based care, what causes you concern/keeps you up at night?
3. How can the AAOS help ensure our members thrive in the value-based healthcare setting?
Robert H. Quinn, MD, FAAOS, FAOA is Professor and Chair of Orthopaedics at UT Health San Antonio. He is Chair of the AAOS Council on Research and Quality. He has previously served on both the BOS and the BOC. He is past-president of the Musculoskeletal Tumor Society. He has served as residency program director at UT Health San Antonio and previously at the University of New Mexico. Dr. Quinn has a strong interest and background in evidence-based medicine and value-based healthcare. He has published over 100 peer-reviewed articles, including 30 related to the critical evaluation of medical evidence.

Dr. Quinn earned his medical degree from Hahnemann University School of Medicine. He completed his orthopaedic residency training at the University of Connecticut and a fellowship in musculoskeletal oncology from Harvard.
## MISSION STATEMENT
Serving our profession to provide the highest quality musculoskeletal care.

## VISION STATEMENT
The trusted leaders in advancing musculoskeletal health.

## GOAL 1: Deliver a personalized and seamless member experience.

**STRATEGIC OBJECTIVES**
1. Use data to define individual member needs and preferences
2. Invest in internal processes and capabilities to transform AAOS’s platform and portfolio to deliver personalized and seamless user experiences
3. Develop strategic partnerships to further enhance AAOS’s offerings
4. Increase in member retention and recruitment

**METRICS**
1. Increase in volume of member specific data collected and analyzed on member needs and preferences
2. Increase in user satisfaction and utilization of content delivery platform
3. Increase in the proportion of content and education personalized to user needs and preferences
4. Increase in member retention and recruitment

## GOAL 2: Equip members to thrive in value-based environments and advance the quality of orthopaedic care.

**STRATEGIC OBJECTIVES**
1. Increase in adoption of AAOS’s quality solutions and tools by members
2. Increase in the proportion of AAOS products that deliver education and data on cost/value
3. Increase in member and institutional participation in AAOS’s family of registries
4. Increase in member utilization of evidence-based and high value treatments
5. Decrease in member utilization of non-evidence-based and low value treatments
6. Increase in % of professional reimbursement tied to value based care delivery

**METRICS**
1. Increase in awareness and impact of new core values and associated behaviors
2. Advancement in AAOS’s governance reflecting best practices
3. Identify a baseline and establish a goal for increasing diversity among AAOS’s board and volunteer structure
4. Increase in amount of revenue generated from new investments in innovation

## GOAL 3: Evolve the culture and governance of AAOS’s board and volunteer structure to become more strategic, innovative, and diverse.

**STRATEGIC OBJECTIVES**
1. Increase in awareness and impact of new core values and associated behaviors
2. Advancement in AAOS’s governance reflecting best practices
3. Identify a baseline and establish a goal for increasing diversity among AAOS’s board and volunteer structure
4. Increase in amount of revenue generated from new investments in innovation

**METRICS**
1. Increase in adoption of AAOS’s quality solutions and tools by members
2. Increase in the proportion of AAOS products that deliver education and data on cost/value
3. Increase in member and institutional participation in AAOS’s family of registries
4. Increase in member utilization of evidence-based and high value treatments
5. Decrease in member utilization of non-evidence-based and low value treatments
6. Increase in % of professional reimbursement tied to value based care delivery

## KEY ENABLERS
- **Advocacy:** Advocate to advance access to and quality of MSK health care, and support providers to thrive in an evolving health care environment
- **Partnerships:** Partner to develop the right content, programs, and platforms to increase member value and drive greater impact
- **Communication:** Communicate renewed member value stemming from new strategic plan
- **Technology:** Continue modernizing AAOS’s technology platforms to offer seamless experiences
AAOS Mandatory Disclosure Policy

Governance Groups (Except Board of Directors), Continuing Medical Education Contributors, Senior Management Team Members, and Others

Philosophy

In order to promote transparency and confidence in the educational programs and in the decisions of the American Academy of Orthopaedic Surgeons and the American Association of Orthopaedic Surgeons (hereinafter collectively referred to as "AAOS"), the AAOS Board of Directors has adopted this mandatory disclosure policy.

The actions and expressions of Fellows or Members providing education of the highest quality or in shaping AAOS policy must be as free of outside influence as possible and any relevant potentially conflicting interests or commercial relationships must be disclosed. Because the AAOS depends upon voluntary service by Fellows and Members to conduct its educational programs and achieve its organizational goals, this disclosure policy has been designed to be realistic and workable.

The AAOS does not view the existence of these interests or relationships as necessarily implying bias or decreasing the value of your participation in the AAOS.

Who Must Disclose

Each participant in the AAOS CME program or author of enduring materials, member of the AAOS Board of Directors, Board of Councilors, Board of Specialty Societies, Councils, Cabinets, Committees, Project Teams or other official AAOS groups (collectively "AAOS governance groups"), editors-in-chief and editorial boards and AAOS clinical practice guidelines, appropriate use criteria and performance measures development workgroups, has the obligation to disclose all potentially conflicting interests. Each participant in the AAOS CME program or author of enduring materials, AAOS governance groups, editors-in-chief and editorial boards and AAOS clinical practice guidelines, appropriate use criteria and performance measures development workgroups must disclose relevant activities or relationships through the AAOS Orthopaedic Disclosure Program.

Responsibility of the Individual Who Discloses

Using a uniform form approved by the AAOS Board of Directors, participants are responsible for providing information to the AAOS Orthopaedic Disclosure Program regarding the nature of their relationships with commercial entities relating to orthopaedics. Participants are responsible for the accuracy and completeness of their information. In addition, participants have an obligation to review and update their personal information in the AAOS Orthopaedic Disclosure Program at least semiannually (usually April and October). It is strongly recommended that participants note any changes to the AAOS Orthopaedic Disclosure Program as soon as possible after they occur. All orthopaedic surgeons are encouraged to participate in the AAOS Orthopaedic Disclosure Program.

Consequences for Failing to Disclose

A failure of a required participant to participate in the AAOS Orthopaedic Disclosure Program will result in the participant being asked not to participate in the AAOS CME program, the AAOS governance group, as editor-in-chief or on an editorial board and AAOS clinical practice guidelines, appropriate use criteria and performance measures development workgroups. The most current version of the AAOS Policy for a
Fellow or Member Who Fails to Disclose Conflicts of Interest When Required shall govern all actions taken under this provision.

Public Disclosure of AAOS Orthopaedic Disclosure Program Information

The information in the AAOS Orthopaedic Disclosure Program shall be available to the public and to other AAOS Fellows and Members. In addition, a list of all participants in the AAOS CME program, AAOS governance group or AAOS clinical practice guidelines, appropriate use criteria and performance measures development workgroups, along with their disclosures, will be included in all meeting materials.

Disclosure of Potential Conflicts of Interests at AAOS Governance Meetings

As indicated above, a list of all participants in the AAOS governance group, along with their current disclosures, will be included in all meeting materials.

Participants in AAOS governance groups (except for the Board of Councilors and Board of Specialty Societies) have an obligation to indicate any potential conflicts they may have during discussions affecting their personal interests during the meeting of the AAOS governance group. At each meeting of the AAOS governance group, members of the group will be reminded that full disclosure must be made of any potential conflict of interest when a matter involving that interest is discussed.

The chair of the governance group shall also have the prerogative of requesting a participant to provide further information or an explanation if the chair identifies a potential conflict of interest regarding that participant. The chair shall be guided by the most current version of the Protocol for the President to Use in Handling Potential Conflict of Interest Issues Before the AAOS Board of Directors. Based on the information provided in the AAOS Orthopaedic Disclosure Program and/or upon a further review, the chair of the AAOS governance group may determine that the participant shall:

- Disclose the potential conflict and continue to participate fully in the AAOS governance group's discussions and vote; ["Disclosure Option"]
- Disclose the potential conflict, address any questions other members of the group have on the subject, then leave the room and not participate in further discussion and vote ["Recusal from Vote option"] or
- Depart from the room until the matter has been fully discussed and acted upon. ["Recusal from Discussion and Vote option"].

If one of these actions is taken, it should be reflected in the minutes of the AAOS governance group's meeting.

Adopted: February 2007; Revised: December 2009; February 2012
AAOS Policy For a Fellow or Member Who Fails To Disclose Conflicts Of Interests Accurately and Completely

AAOS Orthopaedic Disclosure Program Background

1. Each Fellow or Member participating in an AAOS CME program, serving as an author of enduring materials, as a member of the AAOS Councils, Cabinets, Committees, Project Teams or other official AAOS groups, editors-in-chief and editorial boards or AAOS guideline development workgroups has the obligation to disclose all potentially conflicting interests accurately and completely through the AAOS Orthopaedic Disclosure Program.

2. Each Fellow or Member is responsible for providing accurate and complete information to the AAOS Orthopaedic Disclosure Program regarding the nature of his or her relationships with commercial entities relating to orthopaedics, which must be updated at least semiannually (usually April and October). It is recommended that participants note any changes to the AAOS Orthopaedic Disclosure Program as soon as possible after the changes occur.

Directions for Handling Failure of Fellow or Member to Disclose Accurately and Completely

1. Upon receipt of notice that an AAOS Fellow or Member has failed to disclose a conflict of interest accurately or completely, AAOS staff shall discuss the disclosure deficiency with the Fellow or Member. If unsuccessful at obtaining accurate and complete disclosure, AAOS staff shall then talk with the appropriate Committee/Project/Group Chair. From these discussions, AAOS staff will follow AAOS Orthopaedic Disclosure Policy in an effort to obtain the Fellow or Member's accurate and complete disclosure, time permitting.

2. If unsuccessful in obtaining an accurate and complete disclosure, staff will prepare a summary with recommendations on handling the matter, including the following information:

   3. a. The identity of the Fellow or Member and his/her role within the project/program;
   b. Background on the project/program/guideline involved;
   c. Documentation on attempts to have the Fellow or Member complete the Disclosure Report accurately and completely; and
   d. Any materials related to known conflict(s) of interest (e.g., prior disclosures; industry website disclosure report, if available/applicable).
3. The summary will be presented to the Department Manager and/or Executive Team member for review and resolution of the disclosure deficiency issue in conjunction with the Committee/Project/Group Chair.

4. If the issue cannot be satisfactorily resolved, AAOS staff shall submit an updated summary, with supporting materials, to the Office of General Counsel. The Office of General Counsel shall advise the President regarding the appropriate action for AAOS to take. The President of AAOS shall make the final decision regarding matters of accurate and complete disclosure.

- As appropriate, the Office of General Counsel will request the assistance of the Committee on Outside Interests in developing recommendations for the President regarding appropriate actions for failure to accurately and completely report.

5. All incidents of failure to accurately and completely disclose must be submitted to the Office of General Counsel.

6. On an annual basis, the Committee on Outside Interests will review a report developed by the Office of General Counsel documenting any and all incidents of failure to accurately and completely disclose within Academy programs.

The AAOS disclosure and conflict of interest processes are being developed and reviewed with the goal of transparent and appropriate decision-making. This protocol was developed to provide guidance to the various Committee/Program/Group Chairs, Editors, and appropriate staff on challenging conflict of interest issues. This protocol may be modified as other AAOS policies and procedures are developed.

Adopted: September 23, 2011
Revised: December 2011
AAOS Policy for a Fellow or Member Who Fails to Disclose Conflicts of Interest when Required

AAOS Orthopaedic Disclosure Program Background

- Each Fellow or Member participating in an AAOS CME program, serving as an author of enduring materials, as a member of the AAOS Councils, Cabinets, Committees, Project Teams or other official AAOS groups, editors-in-chief and editorial boards or AAOS guideline development workgroups has the obligation to disclose all potentially conflicting interests through the AAOS Orthopaedic Disclosure Program.
- Each Fellow or Member is responsible for providing accurate and complete information to the AAOS Orthopaedic Disclosure Program regarding the nature of his or her relationships with commercial entities relating to orthopaedics, which must be updated at least semiannually (usually April and October). It is recommended that participants note any changes to the AAOS Orthopaedic Disclosure Program as soon as possible after the changes occur.
- The AAOS Orthopaedic Disclosure Policy expressly provides that "a failure of a required participant to participate in the AAOS Orthopaedic Disclosure Program will result in the participant being asked not to participate in the AAOS CME program, the AAOS governance group, as editor-in-chief or on an editorial board and AAOS guideline development."
- All Fellows and Members are encouraged to participate in the AAOS Orthopaedic Disclosure Program.

Directions for Handling Failure of Fellow or Member to Disclose When Required

- Upon receipt of notice that an AAOS Fellow or Member has failed to disclose a conflict of interest when required, AAOS staff shall discuss the disclosure matter with the Fellow or Member who failed to disclose. If unsuccessful in obtaining the disclosure, AAOS staff shall then talk with the appropriate Committee/Project/Group Chair. From these discussions, AAOS staff will follow AAOS Orthopaedic Disclosure Policy in an effort to obtain the Fellow or Member's disclosure, time permitting.
- If unsuccessful in obtaining a disclosure, staff will prepare a summary with recommendations on handling the matter, including the following information:
  - The identity of the Fellow or Member and his/her role within the project/program;
  - Background on the project/program/guideline involved;
  - Documentation on attempts to have the Fellow or Member complete the Disclosure Report; and
  - Any materials related to known conflict(s) of interest (e.g., prior disclosures; industry website disclosure report, if available/applicable).
- The summary will be presented to the Department Manager and/or Executive Team member for review and resolution of the disclosure issue in conjunction with the Committee/Project/Group Chair.
- If the issue cannot be satisfactorily resolved and there is no disclosure, AAOS staff shall submit an updated summary, with supporting materials, to the Office of General Counsel. The Office of
General Counsel shall determine the appropriate action for AAOS to take. The Office of General Counsel will inform the Presidential Line of any actions under consideration for failure to report. In addition, as appropriate, the Office of General Counsel will request the assistance of the Committee on Outside Interests regarding appropriate actions for failure to report.

- All incidents of failure to disclose must be submitted to the Office of General Counsel.
- On an annual basis, the Committee on Outside Interests will review a report developed by the Office of General Counsel documenting any and all incidents of nondisclosure within Academy programs.

The AAOS disclosure and conflict of interest processes are being developed and reviewed with the goal of transparent and appropriate decision-making. This protocol was developed to provide guidance to the various Committee/Program/Group Chairs, Editors, and appropriate staff on challenging conflict of interest issues. This protocol may be modified as other AAOS policies and procedures are developed.

Adopted: September 23, 2011
Public Disclosure Information for Meeting Registrants

2019 National Orthopaedic Leadership Conference - Full Meeting

- Laura Abrahams (This individual reported nothing to disclose); Submitted on: 05/16/2019
- Duncan B Ackerman, MD Submitted on: 05/10/2019
  AAOS: Board or committee member
- Julie E Adams, MD Submitted on: 04/19/2019
  American Association for Hand Surgery: Board or committee member
  American Shoulder and Elbow Surgeons: Board or committee member
  American Society for Surgery of the Hand: Board or committee member
  Arthrex, Inc: IP royalties; Paid consultant
  Biomet: IP royalties
  Journal of Hand Surgery - American: Editorial or governing board
  Zimmer: IP royalties
- Kent R Adamson, MD Submitted on: 04/25/2019
  AAOS Board of Councilors: Board or committee member
  California Orthopaedic Association: Board or committee member
- Dirk H Alander, MD, MHA Submitted on: 04/29/2019
  AAOS: Board or committee member
- Meredith Allison (This individual reported nothing to disclose); Submitted on: 05/16/2019
- Peter C Amadio, MD Submitted on: 04/25/2019
  Johnson & Johnson: Stock or stock Options
  Mayo Alumni Association: Board or committee member
  Merck: Stock or stock Options
  Orthopaedic Research Society: Board or committee member
  Saunders/Mosby-Elsevier: Publishing royalties, financial or material support
- Todd Applebaum (This individual reported nothing to disclose); Submitted on: 05/02/2019
- Michael T Archdeacon, MD Submitted on: 04/04/2019
  Journal of the American Academy of Orthopaedic Surgeons: Editorial or governing board
  Ohio Orthopaedic Society: Board or committee member
  Orthopaedic Trauma Association: Board or committee member
  SLACK Incorporated: Publishing royalties, financial or material support
  Stryker: IP royalties; Paid consultant
- Thomas E Arend Jr (This individual reported nothing to disclose); Submitted on: 04/19/2019
- Michael S Aronow, MD Submitted on: 04/04/2019
  AAOS: Board or committee member
  American Orthopaedic Foot and Ankle Society: Board or committee member
  Connecticut Orthopaedic Society: Board or committee member
  CreOsso, LLC: Stock or stock Options
  Foot and Ankle International: Editorial or governing board
  Techniques in Foot and Ankle Surgery: Editorial or governing board
  Techniques in Orthopaedics: Editorial or governing board
- Henry A Backe Jr, MD Submitted on: 04/25/2019
  AAOS: Board or committee member
  American Society for Surgery of the Hand: Board or committee member
  EOA: Board or committee member
2019 National Orthopaedic Leadership Conference - Full Meeting

- **James R Bailey, MD** Submitted on: 04/07/2019
  AAOS: Board or committee member
  Society of Military Orthopaedic Surgeons: Board or committee member

- **Robert C Baird, III MD** Submitted on: 05/05/2019
  Alabama Orthopaedic Society: Board or committee member

- **James J Balaschak, MD** (This individual reported nothing to disclose); Submitted on: 04/10/2019

- **James William Barber, MD** Submitted on: 05/12/2019
  Georgia Orthopaedic Society: Board or committee member
  Georgia Society of Ambulatory Surgery Centers: Board or committee member
  Medical Association of Georgia: Board or committee member
  South Georgia Physicians Association: Board or committee member

- **Thomas C Barber, MD** Submitted on: 05/08/2019
  Clarify: Stock or stock Options
  Clarify Health: Unpaid consultant
  Sharp Fluidics: Stock or stock Options

- **R Shane Barton, MD** Submitted on: 04/20/2019
  Louisiana Orthopaedic Association BOD: Board or committee member

- **Johnathan Bernard, MD, MPH** Submitted on: 05/10/2019
  Arthroscopy Association of North America: Board or committee member

- **Jonathan P Bigley, Esq** (This individual reported nothing to disclose); Submitted on: 05/21/2019

- **Andre Blom, PT** (This individual reported nothing to disclose); Submitted on: 05/16/2019

- **Michael Bolognesi, MD** Submitted on: 04/30/2019
  Acelity: Other financial or material support
  Amedica: Stock or stock Options; Unpaid consultant
  American Association of Hip and Knee Surgeons: Board or committee member
  AOA Omega: Other financial or material support
  Arthroplasty Today: Editorial or governing board
  Biomet: Research support
  DePuy, A Johnson & Johnson Company: Research support
  Eastern Orthopaedic Association: Board or committee member
  Exactech, Inc: Research support
  Journal of Arthroplasty: Editorial or governing board
  Journal of Surgical Orthopaedic Advances: Editorial or governing board
  KCI: Research support
  Smith & Nephew: Other financial or material support; Unpaid consultant
  TJO: IP royalties; Paid presenter or speaker; Stock or stock Options
  Zimmer: IP royalties; Paid presenter or speaker; Research support

- **Joseph A Bosco, III MD** Submitted on: 04/20/2019
  Genovel: Stock or stock Options
  Proventus Health: Stock or stock Options
  Relative Risk Solutions: Stock or stock Options

- **Eric Martin Boyden, MD** Submitted on: 04/10/2019
  AAOS: Board or committee member
  Nevada Orthopaedic Society: Board or committee member
  Orthopaedic Implant Company (OIC): Stock or stock Options
  Renown Regional Medical Center: Board or committee member
  Saint Mary’s Regional Medical Center: Employee
2019 National Orthopaedic Leadership Conference - Full Meeting

- **Steven R Boyea, MD** (This individual reported nothing to disclose); Submitted on: 05/05/2019
- **Alix Braun** (This individual reported nothing to disclose); Submitted on: 05/30/2019
- **Benjamin Maurice Braun, MD** Submitted on: 05/30/2019
  - AAOS: Board or committee member
  - Bristol-Myers Squibb: Stock or stock Options
  - Zimmer: Stock or stock Options
- **Bryan D Bredthauer, MD** Submitted on: 05/16/2019
  - AAOS: Board or committee member
  - Nebraska Orthopaedic Hospital: Stock or stock Options
- **Justin D Bric, MD** (This individual reported nothing to disclose); Submitted on: 05/26/2019
- **Gary T Brock, MD** Submitted on: 04/25/2019
  - AAOS: Board or committee member
  - K2M: Paid consultant
  - Scoliosis Research Society: Board or committee member
- **Richard Franklin Bruch, MD** Submitted on: 05/02/2019
  - Chair, The OrthoForum Advocacy Committee: Board or committee member
  - Consultant to EmergeOrtho: Board or committee member
  - Consultant to North Carolina Specialty Hospital: Board or committee member
  - Registered Lobbyist, State of North Carolina: Board or committee member
- **Jacob M Buchowski, MD, MS** Submitted on: 04/08/2019
  - AAOS: Board or committee member
  - American Spinal Injury Association: Board or committee member
  - Association of Bone and Joint Surgeons: Board or committee member
  - Cervical Spine Research Society: Board or committee member
  - FOSA: Board or committee member
  - Globus Medical: IP royalties
  - K2M: IP royalties
  - Lumbar Spine Research Society: Board or committee member
  - North American Spine Society: Board or committee member
  - Scoliosis Research Society: Board or committee member
  - Spine Deformity: Editorial or governing board
  - Wolters Kluwer Health - Lippincott Williams & Wilkins: Publishing royalties, financial or material support
- **Angela Buckley** (This individual reported nothing to disclose); Submitted on: 05/30/2019
- **Patricia Ann Buelow** (This individual reported nothing to disclose); Submitted on: 04/27/2019
- **Sean Thomas Burns, MD** Submitted on: 05/17/2019
  - ROM3: Stock or stock Options
  - Vindico Medical: Publishing royalties, financial or material support
- **Mike Butler, CEO** (This individual reported nothing to disclose); Submitted on: 05/15/2019
- **Dori N Cage, MD** Submitted on: 04/14/2019
  - AAOS: Board or committee member
  - California Orthopaedic Association: Board or committee member
  - Ruth Jackson Orthopaedic Society: Board or committee member
2019 National Orthopaedic Leadership Conference - Full Meeting

- **John J Callaghan, MD** Submitted on: 05/08/2019
  - Cresco Labs: Stock or stock Options
  - DePuy, A Johnson & Johnson Company: IP royalties; Paid consultant
  - Flexion Therapeutics: Stock or stock Options
  - International Hip Society: Board or committee member
  - Joint Vue: Stock or stock Options
  - Journal of Arthroplasty: Editorial or governing board
  - Journal of Arthroplasty (Deputy Editor): Publishing royalties, financial or material support
  - Knee Society: Board or committee member
  - Orthopaedic Research and Education Foundation: Board or committee member
  - Wolters Kluwer Health - Lippincott Williams & Wilkins: Publishing royalties, financial or material support

- **Lisa K Cannada, MD** Submitted on: 04/25/2019
  - Foundation for Orthopaedic Trauma: Research support
  - Mid America Orthopaedic Association: Board or committee member
  - Orthopaedic Trauma Association: Board or committee member

- **David L Cannon, MD** Submitted on: 04/25/2019
  - AAOS: Board or committee member
  - American Orthopaedic Association: Board or committee member
  - Memphis Medical Society: Board or committee member
  - Saunders/Mosby-Elsevier: Publishing royalties, financial or material support
  - Tennessee Orthopaedic Society: Board or committee member

- **Paul H Castello, MD** (This individual reported nothing to disclose); Submitted on: 04/25/2019

- **Kathleen Caswell** (This individual reported nothing to disclose); Submitted on: 05/03/2019

- **David Holmes Chafey, III MD** (This individual reported nothing to disclose); Submitted on: 04/29/2019

- **David R Chandler, MD** Submitted on: 05/06/2019
  - Florida Orthopaedic Society: Board or committee member
  - North American Spine Society: Board or committee member

- **Adam J Chase, MD** (This individual reported nothing to disclose); Submitted on: 05/02/2019
2019 National Orthopaedic Leadership Conference - Full Meeting

- **Antonia F Chen, MD, MBA** Submitted on: 04/16/2019
  - 3M: Paid consultant
  - AAOS: Board or committee member
  - ACI: Paid consultant
  - AJRR: Board or committee member
  - American Association of Hip and Knee Surgeons: Board or committee member
  - American Medical Foundation: Paid consultant
  - Annals of Joint: Editorial or governing board
  - bOne: Paid consultant
  - Bone & Joint 360 Journal: Editorial or governing board
  - Clinical Orthopaedics and Related Research: Editorial or governing board
  - Convatec: Paid consultant
  - DJ Orthopaedics: Paid consultant
  - European Knee Association: Board or committee member
  - Graftworx: Stock or stock Options
  - Halyard: Research support
  - Haylard: Paid consultant
  - Healthcare Transformation: Editorial or governing board
  - Heraeus: Paid consultant
  - Hyalex: Stock or stock Options
  - International Congress for Joint Reconstruction: Board or committee member
  - Irrimax: Paid consultant; Research support
  - Joint Purification Systems: Stock or stock Options
  - Journal of Arthroplasty: Editorial or governing board
  - Journal of Bone & Joint Infection: Editorial or governing board
  - Knee Surgery, Sports Traumatology, Arthroscopy: Editorial or governing board
  - Musculoskeletal Infection Society: Board or committee member
  - Recro: Paid consultant
  - SLACK Incorporated: Publishing royalties, financial or material support
  - Smith & Nephew: Research support
  - Sonoran: Stock or stock Options
  - Stryker: Paid consultant
  - Zimmer: Paid consultant

- **Akin Cil, MD** Submitted on: 05/07/2019
  - Missouri State Orthopaedic Association, Board Member: Board or committee member
  - Orthopedics: Editorial or governing board
  - Stryker, shoulder replacement: Paid consultant

- **Kevin E Coates, MD, MBA, MPT** Submitted on: 04/03/2019
  - Arthrex, Inc: Paid consultant
  - Arthroscopy Association of North America: Board or committee member

- **Fraser Cobbe** (This individual reported nothing to disclose); Submitted on: 04/15/2019

- **Bradley Coffey, MA** (This individual reported nothing to disclose); Submitted on: 05/15/2019

- **Bruce E Cohen, MD** Submitted on: 04/25/2019
  - Acumed, LLC: Research support
  - American Orthopaedic Foot and Ankle Society: Board or committee member
  - Amniox: Paid consultant
  - Arthrex, Inc: IP royalties
  - DJ Orthopaedics: IP royalties
  - Tissue Tech: Stock or stock Options
  - Wright Medical Technology, Inc.: IP royalties; Paid consultant
Public Disclosure Information for Meeting Registrants

2019 National Orthopaedic Leadership Conference - Full Meeting

- **Mark J Conklin, MD** (This individual reported nothing to disclose); Submitted on: 05/04/2019
- **Michael P Connair, MD** Submitted on: 04/26/2019
  AAOS, Connecticut Orthopaedic Society, Connecticut State Medical Society, New Haven County Medical Assn, Connecticut State Medical Society IPA: Board or committee member
  National Union of Hospital and Health Care Employees and the Federation of Physicians and Dentists (AFSCME,AFL-CIO): Board or committee member
- **Matthew Conti, MD** (This individual reported nothing to disclose); Submitted on: 04/03/2019
- **Scott Snow Cooper, MD** Submitted on: 04/30/2019
  Arkansas Medical Society: Board or committee member
- **Frank A Cordasco, MD** Submitted on: 04/05/2019
  American Shoulder and Elbow Surgeons: Board or committee member
  Arthrex, Inc: IP royalties; Paid consultant
  Journal of Shoulder and Elbow Surgery: Editorial or governing board
  Saunders/Mosby-Elsevier: Publishing royalties, financial or material support
  Wolters Kluwer Health - Lippincott Williams & Wilkins: Publishing royalties, financial or material support
- **Brig Gen (Ret) Kory Cornum, MD** Submitted on: 04/04/2019
  AAOS: Board or committee member
  Arthroscopy Association of North America: Board or committee member
  Orthopaedic Trauma Association: Board or committee member
  Society of Military Orthopaedic Surgeons: Board or committee member
- **Kristen Morrell Coultas** (This individual reported nothing to disclose); Submitted on: 05/09/2019
- **Dennis Coyle** (This individual reported nothing to disclose); Submitted on: 05/16/2019
- **Kevin J Cronin, MD** Submitted on: 04/25/2019
  AAOS: Board or committee member
  Kentucky Orthopaedic Society: Board or committee member
- **Adair Cunningham** (This individual reported nothing to disclose); Submitted on: 04/03/2019
- **Alexandra D'agostini, MD** (This individual reported nothing to disclose); Submitted on: 05/03/2019
- **Dino Damalas** (This individual reported nothing to disclose); Submitted on: 04/30/2019
- **John P Davis, RN** Submitted on: 05/14/2019
  HSS Journal: Editorial or governing board
  Johnson & Johnson: Paid consultant
  National Association of Orthopaedic Nurses: Board or committee member
- **Molly Day, MD** (This individual reported nothing to disclose); Submitted on: 05/06/2019
- **Shreyasi Deb** (This individual reported nothing to disclose); Submitted on: 04/29/2019
2019 National Orthopaedic Leadership Conference - Full Meeting

- **Gregory John Della Rocca, MD, PhD, FACS** Submitted on: 04/25/2019  
  AAOS: Board or committee member  
  American College of Surgeons: Board or committee member  
  American Orthopaedic Association: Board or committee member  
  Bioventus: Paid consultant  
  Geriatric Orthopaedic Surgery and Rehabilitation: Editorial or governing board  
  Journal of Orthopaedic Trauma: Editorial or governing board  
  Mergent: Stock or stock Options  
  Orthopaedic Trauma Association: Board or committee member  
  The Orthopaedic Implant Company: Stock or stock Options  
  Wright Medical Technology, Inc.: Paid consultant

- **Marlene DeMaio, MD** Submitted on: 04/15/2019  
  AAOS: Board or committee member  
  American Journal of Sports Medicine: Editorial or governing board  
  American Orthopaedic Society for Sports Medicine: Board or committee member  
  Clinical Orthopaedics and Related Research: Editorial or governing board  
  Ruth Jackson Orthopaedic Society: Board or committee member

- **Matthew R DiCaprio, MD** Submitted on: 04/24/2019  
  AAOS: Board or committee member  
  Musculoskeletal Tumor Society: Board or committee member

- **Kyle F Dickson, MD** Submitted on: 05/08/2019  
  AAOS: Board or committee member  
  AOS: IP royalties; Paid presenter or speaker  
  Biomet: Paid consultant  
  biomet, Stryker: Paid presenter or speaker  
  EPIX: Board or committee member; Stock or stock Options; Unpaid consultant  
  Foundation of Orthopaedic Trauma: Board or committee member  
  Stryker: Paid consultant  
  Texas Orthopaedic Society: Board or committee member

- **Nick M DiGiovine, MD** Submitted on: 04/25/2019  
  AAOS: Board or committee member  
  Montana Orthopedic Society: Board or committee member  
  Summit Surgery Center: Stock or stock Options

- **Julie A Dodds, MD** Submitted on: 05/06/2019  
  AAOS: Board or committee member  
  Arthroscopy Association of North America Board of Directors: Board or committee member  
  Mitek: Paid presenter or speaker

- **Edward J Dohring, MD** Submitted on: 05/17/2019  
  AAOS: Board or committee member  
  North American Spine Society: Board or committee member  
  Stryker: IP royalties

- **Greg Dummer, CAE** Submitted on: 04/25/2019  
  American Orthopaedic Society for Sports Medicine: Board or committee member

- **J Wendell Duncan, MD** Submitted on: 04/25/2019  
  AAOS: Board or committee member
2019 National Orthopaedic Leadership Conference - Full Meeting

- **Scott F M Duncan, MD, MPH, MBA** Submitted on: 05/05/2019
  - AAOS: Board or committee member
  - American Society for Surgery of the Hand: Board or committee member
  - Springer: Publishing royalties, financial or material support

- **C Anderson Engh Jr, MD** Submitted on: 04/24/2019
  - AAOS: Board or committee member
  - DePuy, A Johnson & Johnson Company: IP royalties; Research support; Stock or stock Options
  - Hip Society: Board or committee member
  - Smith & Nephew: Research support

- **Stephen Engstrom, MD** (This individual reported nothing to disclose); Submitted on: 05/14/2019

- **Orry Erez, MD** Submitted on: 04/12/2019
  - AAOS: Board or committee member
  - Brooklyn Orthopedic Society: Board or committee member
  - New York State Society of Orthopedic Surgeons: Board or committee member
  - Premia Spine: Stock or stock Options

- **Kristen Erickson, CAE** (This individual reported nothing to disclose); Submitted on: 04/03/2019

- **Fred Essis** (This individual reported nothing to disclose); Submitted on: 04/26/2019

- **Sara Estes** Submitted on: 05/16/2019
  - Aimmune Therapeutics: Stock or stock Options
  - Aldeyra Therapeutics: Stock or stock Options
  - Allergan: Stock or stock Options
  - Audentes Therapeutics: Stock or stock Options
  - Biogen: Stock or stock Options
  - Boston Scientific: Stock or stock Options
  - Esperion Therapeutic: Stock or stock Options
  - GlaxoSmithKline: Stock or stock Options
  - Global Blood Therapeutics: Stock or stock Options
  - Insulet Corporation: Stock or stock Options
  - Kalvista Pharmaceuticals: Stock or stock Options
  - Nektar Therapeutics: Stock or stock Options
  - Perrigo: Employee; Other financial or material support
  - Regeneron Pharmaceuticals: Stock or stock Options
  - Valeant Pharmaceuticals: Stock or stock Options
  - XBiotech: Stock or stock Options

- **Brent A Felix, MD** (This individual reported nothing to disclose); Submitted on: 05/16/2019

- **James R Ficke, MD** Submitted on: 04/13/2019
  - AAOS: Board or committee member
  - American Orthopaedic Association: Board or committee member
  - Journal of Southern Orthopedic Association: Editorial or governing board
  - Orthopaedic Research and Education Foundation: Board or committee member
  - Orthopedics Today: Editorial or governing board
  - Southern Orthopaedic Association: Board or committee member

- **Kristina M Finney** (This individual reported nothing to disclose); Submitted on: 05/29/2019
2019 National Orthopaedic Leadership Conference - Full Meeting

- **Stuart James Fischer, MD** Submitted on: 05/08/2019
  - AAOS: Board or committee member
  - AAOS Now: Editorial or governing board
  - AAOS OrthoInfo: Editorial or governing board
  - AAOS, NJOS, OSNJ, NJMLIPA: Board or committee member
  - Jones and Bartlett Publishers Sudbury, MA: Publishing royalties, financial or material support

- **Jill C Flanagan, MD** Submitted on: 04/29/2019
  - Limb Lengthening Research Society: Board or committee member
  - Orthofix, Inc.: Paid consultant

- **Olga Foley, CAE** (This individual reported nothing to disclose); Submitted on: 04/25/2019

- **Mitchell Fourman, MD** (This individual reported nothing to disclose); Submitted on: 04/12/2019

- **Austin Thomas Fragomen, MD** Submitted on: 05/01/2019
  - Limb Lengthening Research Society: Board or committee member
  - Nuvasive: Paid consultant; Paid presenter or speaker
  - Smith & Nephew: Paid consultant; Paid presenter or speaker
  - Synthes: Paid consultant; Paid presenter or speaker

- **Liz Frale** (This individual reported nothing to disclose); Submitted on: 05/21/2019

- **Mark A Frankie, MD** Submitted on: 04/17/2019
  - AAOS: Board or committee member
  - American Shoulder and Elbow Surgeons: Board or committee member
  - Cayenne Medical: IP royalties; Paid consultant
  - DJO Surgical: IP royalties; Paid consultant; Paid presenter or speaker; Research support
  - Synchrony Healthcare Communications: Paid consultant
  - Zimmer: Research support

- **Corinna C D Franklin, MD** Submitted on: 05/01/2019
  - AAOS: Board or committee member
  - Pediatric Orthopaedic Society of North America: Board or committee member
  - Pediatric Research in Sports Medicine: Board or committee member
  - Ruth Jackson Orthopaedic Society: Board or committee member

- **Brenda A Frederick** (This individual reported nothing to disclose); Submitted on: 05/06/2019

- **Brett Freedman, MD** (This individual reported nothing to disclose); Submitted on: 05/17/2019

- **David A Fuller, MD** Submitted on: 04/29/2019
  - Orthopaedic Rehabilitation Association: Board or committee member

- **Brian J Galinat, MD, MBA** Submitted on: 04/30/2019
  - Delaware Society of Orthopaedic Surgeons: Board or committee member

- **George Damon Gantsoudes, MD** Submitted on: 05/10/2019
  - AAOS: Publishing royalties, financial or material support
  - Pediatric Orthopaedic Society of North America: Board or committee member
2019 National Orthopaedic Leadership Conference - Full Meeting

- **Jonathan P Garino, MD, MBA** Submitted on: 04/30/2019
  - American Association of Hip and Knee Surgeons: Board or committee member
  - Clinical Orthopaedics and Related Research: Editorial or governing board
  - Journal of Arthroplasty: Editorial or governing board
  - Knee: Editorial or governing board
  - Pennsylvania orthopedic society: Board or committee member
  - Shukla Medical: IP royalties
  - Smith & Nephew: IP royalties; Paid consultant; Research support
  - Zimmer: Research support

- **Samuel D Gerber, MD** Submitted on: 04/03/2019
  - AAOS: Board or committee member
  - American Board of Orthopaedic Surgery, Inc.: Board or committee member
  - Mass Orthopedic Association: Board or committee member
  - Pristine Surgical: Stock or stock Options
  - ROM: Stock or stock Options

- **Wilford K Gibson, MD** Submitted on: 04/19/2019
  - AAOS: Board or committee member
  - AAOS Now: Editorial or governing board

- **Shawn R Gilbert, MD** Submitted on: 10/12/2018
  - AAOS POSNA: Board or committee member
  - Alabama Orthopaedic Society: Board or committee member

- **John T Gill, MD** Submitted on: 04/11/2019
  - AAOS: Board or committee member
  - American Medical Association: Board or committee member
  - Texas Orthopaedic Association: Board or committee member
  - Texas Medical Association: Board or committee member

- **Jonathan D Gillig, MD** Submitted on: 05/03/2019
  - (This individual reported nothing to disclose)

- **Steven A Giuseffi, MD** Submitted on: 04/23/2019
  - (This individual reported nothing to disclose)

- **Kristy Glass** Submitted on: 04/30/2019
  - (This individual reported nothing to disclose)

- **Rachel Y Goldstein, MD** Submitted on: 04/19/2019
  - AAOS: Board or committee member
  - Pediatric Orthopaedic Society of North America: Board or committee member

- **Tressa Goulding, CAE** Submitted on: 04/25/2019
  - Scoliosis Research Society: Board or committee member

- **Robert David Graham, MD** Submitted on: 05/09/2019
  - AAOS: Board or committee member

- **Robert Allen Green, MD** Submitted on: 05/01/2019
  - Connecticut Orthopedic Society: Board or committee member
  - Connecticut State Medical Examining Board: Board or committee member
  - Hartford County Medical Association: Board or committee member
  - Saint Francis Hospital Medical Executive Committee: Board or committee member

- **Alan G Greenwald, MD** Submitted on: 04/24/2019
  - AAOS: Board or committee member
  - Washington State Orthopedic Assn: Board or committee member

- **Babette M Grey** Submitted on: 05/16/2019
  - (This individual reported nothing to disclose)
2019 National Orthopaedic Leadership Conference - Full Meeting

- **Steven I Grindel, MD** Submitted on: 04/30/2019
  AAOS: Board or committee member
  Wisconsin Orthopaedic Society: Board or committee member
  Wright Medical Technology, Inc.: Paid consultant; Research support

- **Stuart Trent Guthrie, MD** Submitted on: 05/01/2019
  AAOS: Board or committee member
  Michigan Orthopaedic Society: Board or committee member

- **Daniel K. Guy, MD** Submitted on: 04/12/2019
  Orthofix, Inc.: Employee

- **Chad M Hanson, MD** Submitted on: 05/01/2019
  Nevada Orthopaedic Society: Board or committee member

- **Alicia Karin Harrison, MD** Submitted on: 05/06/2019
  American College of Surgeons: Board or committee member
  Arthrex, Inc: Paid presenter or speaker
  Minnesota Orthopaedic Society: Board or committee member

- **Mickey D Haryanto, BSN, MBA, RN** Submitted on: 05/13/2019
  National Association of Orthopaedic Nurses: Board or committee member
  Orthopaedic Nursing Journal: Editorial or governing board

- **Melvin D Helgeson, MD** (This individual reported nothing to disclose); Submitted on: 04/05/2019

- **M Bradford Henley, MD, MBA, FACS** Submitted on: 04/30/2019
  AAOS: Board or committee member
  Renovis: IP royalties
  Renovis (formerly Synergy Surgical Technologies): Stock or stock Options
  Wolters Kluwer Health - Lippincott Williams & Wilkins: Publishing royalties, financial or material support
  Zimmer: Paid consultant

- **Andrea Herzka, MD** Submitted on: 05/06/2019
  Arthrex, Inc: Other financial or material support
  Smith & Nephew: Other financial or material support
  Zimmer: Research support

- **Carolyn Hettrich, MD, MPH** Submitted on: 04/28/2019
  American Orthopaedic Society for Sports Medicine: Board or committee member

- **William Higginbotham III, MD** (This individual reported nothing to disclose); Submitted on: 05/06/2019
2019 National Orthopaedic Leadership Conference - Full Meeting

- **Carlos A Higuera Rueda, MD** Submitted on: 05/23/2019
  - American Association of Hip and Knee Surgeons: Board or committee member
  - American Journal of Orthopedics: Editorial or governing board
  - CD Diagnostics: Research support
  - Cymedica: Research support
  - Ferring Pharmaceuticals: Research support
  - Journal of Arthroplasty: Editorial or governing board
  - Journal of Hip Surgery: Editorial or governing board
  - Journal of Knee Surgery: Editorial or governing board
  - KCI: Paid consultant; Paid presenter or speaker; Research support
  - Mid-American Orthopaedic Association: Board or committee member
  - Musculoskeletal Infection Society: Board or committee member
  - OREF: Research support
  - Orthofix, Inc.: Research support
  - Orthogenics: Research support
  - PSI: Stock or stock Options
  - Stryker: Research support
  - Zimmer: Paid consultant; Research support

- **Alan S Hilibrand, MBA, MD** Submitted on: 04/11/2019
  - Amedica: IP royalties
  - Biomet: IP royalties
  - Lifespine: Stock or stock Options
  - Paradigm spine: Stock or stock Options

- **Bobby Hillert** (This individual reported nothing to disclose); Submitted on: 04/29/2019

- **John William Hinchey, MD** Submitted on: 04/26/2019
  - Bexar County Medical Society: Board or committee member
  - ROM 3: Stock or stock Options
  - Texas Medical Associate: Board or committee member
  - Texas Orthopaedic Association: Board or committee member
  - Texas Orthopaedic Political Action Committee: Board or committee member
  - TexPAC: Board or committee member

- **Peter T Hodges, MD** Submitted on: 05/02/2019
  - Kansas Orthopaedic Society: Board or committee member

- **James Irvin Huddleston III, MD** Submitted on: 04/27/2019
  - American Association of Hip and Knee Surgeons: Board or committee member
  - American Knee Society: Research support
  - Biomet: Paid consultant; Research support
  - California Joint Replacement Registry: Paid consultant
  - Corin U.S.A.: Paid consultant; Paid presenter or speaker; Research support
  - Exactech, Inc: IP royalties; Paid consultant; Paid presenter or speaker
  - Hip Society: Board or committee member
  - Journal of Arthroplasty: Editorial or governing board
  - Knee Society: Board or committee member
  - Porosteon: Paid consultant; Stock or stock Options
  - Robert Wood Johnson Foundation: Research support
  - Wolters Kluwer Health - Lippincott Williams & Wilkins: Publishing royalties, financial or material support
  - Zimmer: Paid consultant; Paid presenter or speaker
2019 National Orthopaedic Leadership Conference - Full Meeting

- **Charles D Hummer III, MD** Submitted on: 04/30/2019
  Flexion: Paid consultant
  PA Orthopaedic Society Board of Directors: Board or committee member
  Sanofi-Aventis: Paid consultant

- **James A Hurt, III MD** Submitted on: 04/15/2019
  Arthroscopy Association of North America: Board or committee member
  Smith & Nephew: Paid consultant

- **Zane Brooks Hyde, MD** (This individual reported nothing to disclose); Submitted on: 05/02/2019

- **Cassim M Igram, MD** Submitted on: 04/24/2019
  AAOS: Board or committee member
  Clinical Neurology and Neurosurgery: Editorial or governing board
  Iowa Orthopedic Society Board Member: Board or committee member

- **Omer A Ilahi, MD** Submitted on: 04/30/2019
  AAOS: Board or committee member
  Biomet: Research support
  Texas Orthopaedic Journal: Editorial or governing board
  Western Orthopaedic Association: Board or committee member

- **Kyle James Jeray, MD** Submitted on: 04/28/2019
  American Board of Orthopaedic Surgery, Inc.: Board or committee member
  American Orthopaedic Association: Board or committee member
  International Journal of Orthopedic Trauma: Editorial or governing board
  Journal of Bone and Joint Surgery - American: Editorial or governing board
  Journal of Orthopaedic Trauma: Editorial or governing board
  Journal of the American Academy of Orthopaedic Surgeons: Editorial or governing board
  Orthopaedic Trauma Association: Board or committee member
  Radius: Paid presenter or speaker
  Southeastern Fracture Consortium: Board or committee member
  Zimmer: Paid consultant

- **Wayne Anthony Johnson, MD** Submitted on: 04/03/2019
  AAOS: Board or committee member
  AAOS Board of Councilors: Board or committee member
  AAOS Council on Research and Quality: Board or committee member

- **Lynne C Jones, PhD** Submitted on: 05/16/2019
  ARCO International: Board or committee member
  Journal of Arthroplasty: Editorial or governing board
  Journal of Biomedical Materials research - B: Editorial or governing board
  Journal of Biomedical Materials Research -A: Editorial or governing board
  Journal of Hip Surgery: Editorial or governing board
  National Osteonecrosis Foundation: Board or committee member
  Orthopaedic Research Society: Board or committee member
  Rocky Mountain Bioengineering Symposium: Board or committee member
  UpToDate: Paid consultant
  Zimmer: Paid consultant

- **Tania Meyer Jones** (This individual reported nothing to disclose); Submitted on: 04/26/2019
2019 National Orthopaedic Leadership Conference - Full Meeting

- Ken J Kaminski, MD Submitted on: 05/07/2019
  AAOS: Board or committee member
  Fusion5: Paid consultant
  Texas Orthopedic Association: Board or committee member

- Steven Montgomery Kane, MD Submitted on: 04/09/2019
  Johnson & Johnson: Stock or stock Options

- Timothy L Keenen, MD Submitted on: 05/06/2019
  AAOS: Board or committee member
  Biedermann Motech: Paid consultant
  Oregon Association of Orthopedic Surgeons: Board or committee member
  The Spine Journal: Editorial or governing board

- E Jeff Kennedy, MD (This individual reported nothing to disclose); Submitted on: 05/02/2019

- Joshua Kerr (This individual reported nothing to disclose); Submitted on: 04/25/2019

- Elspeth R E Kinnucan, MD Submitted on: 04/23/2019
  American Society for Surgery of the Hand: Board or committee member
  California Orthopaedic Association: Board or committee member

- Brian A Klatt, MD Submitted on: 04/30/2019
  AAOS: Board or committee member
  AAOSAAHKS Abstract Review Committee: Board or committee member
  American Association of Hip and Knee Surgeons: Board or committee member
  Clinical Orthopaedics and Related Research: Editorial or governing board
  Journal of Arthroplasty: Editorial or governing board
  Journal of the American Academy of Orthopaedic Surgeons: Editorial or governing board
  MSIS: Board or committee member
  SLACK Incorporated: Publishing royalties, financial or material support

- Lindsay Knox (This individual reported nothing to disclose); Submitted on: 04/22/2019

- Jason L Koh, MD Submitted on: 04/03/2019
  AAOS: Board or committee member
  ACL Study Group: Board or committee member
  Acuitive: Paid consultant; Stock or stock Options
  American Orthopaedic Society for Sports Medicine: Board or committee member
  American Shoulder and Elbow Surgeons: Board or committee member
  Arthroscopy Association of North America: Board or committee member
  Flexion: Paid consultant
  Herodicus Society: Board or committee member
  Illinois Association of Orthopaedic Surgeons: Board or committee member
  International Patellofemoral Study Group: Board or committee member
  International Society of Arthroscopy, Knee Surgery, and Orthopaedic Sports Medicine: Board or committee member
  Marrow Access Technologies: Employee; Stock or stock Options
  Orthopaedic Journal of Sports Medicine/AOSSM: Editorial or governing board
  Patellofemoral Foundation: Board or committee member

- Barry S Kraushaar, MD (This individual reported nothing to disclose); Submitted on: 04/29/2019

- Madeline Kroll Submitted on: 04/26/2019
  Medtronic: Stock or stock Options

- John Christopher Kurylo, MD (This individual reported nothing to disclose); Submitted on: 04/25/2019
2019 National Orthopaedic Leadership Conference - Full Meeting

- **Bradley Randall Kuzel, MD** (This individual reported nothing to disclose); Submitted on: 05/01/2019
- **Amy L Ladd, MD** Submitted on: 04/28/2019
  - American Orthopaedic Association: Board or committee member
  - American Society for Surgery of the Hand: Board or committee member
  - Dhablania family trust: Research support
  - Locis Orthopaedics: Unpaid consultant
  - National Institutes of Health (NIAMS & NICHID): Research support
  - Perry Initiative: Board or committee member
  - Williams Foundation Charitable Trust: Research support

- **Claudette Lajam, MD** Submitted on: 04/25/2019
  - AAOS: Board or committee member
  - Arthrex, Inc: Paid presenter or speaker
  - Clinical Orthopaedics and Related Research: Editorial or governing board
  - Fundamental VR (education): Paid consultant
  - International Orthopaedics: Editorial or governing board
  - My home hospital journal: Editorial or governing board
  - NYSSOS: Board or committee member
  - Pfizer: Employee; Stock or stock Options

- **Dawn LaPorte, MD** Submitted on: 04/07/2019
  - ACGME - Orthopaedic RRC: Board or committee member
  - American Orthopaedic Association: Board or committee member
  - American Society for Surgery of the Hand: Board or committee member
  - Journal of Hand Surgery - American: Editorial or governing board
  - Ruth Jackson Orthopaedic Society: Board or committee member

- **Brandon D Lawrence, MD** Submitted on: 04/26/2019
  - AO Spine Fellowship Committee: Board or committee member
  - AO Spine North America: Paid presenter or speaker
  - Cervical Spine Research Society: Board or committee member
  - K2M: Paid presenter or speaker

- **Lance E LeClere, MD** Submitted on: 04/29/2019
  - American Orthopaedic Society for Sports Medicine: Board or committee member
  - Arthroscopy: Editorial or governing board
  - Society of Military Orthopaedic Surgeons: Board or committee member

- **Michael J Leddy, MD** Submitted on: 04/29/2019
  - American Orthopaedic Society for Sports Medicine: Board or committee member
  - Arthrex, Inc: Paid consultant; Paid presenter or speaker
  - Louisiana Athletic Trainer’s Association: Board or committee member
  - Louisiana Orthopaedic Association: Board or committee member

- **Daniel E Lehman, MD** Submitted on: 04/25/2019
  - Acumed, LLC: Paid consultant
  - American Orthopaedic Foot and Ankle Society: Board or committee member
  - Indiana Orthopaedic Society: Board or committee member
  - Johnson & Johnson: Stock or stock Options
  - Merck: Stock or stock Options
  - OMEGA: Stock or stock Options
  - Pfizer: Stock or stock Options
  - Procter & Gamble: Stock or stock Options
2019 National Orthopaedic Leadership Conference - Full Meeting

- Elaine M Leighton, MPH, CAE (This individual reported nothing to disclose); Submitted on: 04/30/2019
  - AAOS: Board or committee member
  - Integra Lifesciences: Stock or stock Options
  - Journal of Bone and Joint Surgery - American: Editorial or governing board
  - Musculoskeletal Tumor Society: Board or committee member
  - Pfizer: Stock or stock Options
  - SeaSpine Holding: Stock or stock Options

- Adam S Levin, MD Submitted on: 04/18/2019
  - AAOS: Board or committee member
  - Integra Lifesciences: Stock or stock Options

- Rosemary Lobeck (This individual reported nothing to disclose); Submitted on: 04/25/2019

- Peter A Looby, MD (This individual reported nothing to disclose); Submitted on: 04/26/2019

- Ariana Lott, MD (This individual reported nothing to disclose); Submitted on: 04/25/2019

- R Stephen Lucie, MD Submitted on: 04/25/2019
  - American Orthopaedic Society for Sports Medicine: Board or committee member

- Steven Thomas Lyons, MD Submitted on: 04/25/2019
  - Amedica: Stock or stock Options
  - Florida Orthopaedic Society: Board or committee member
  - Journal of Arthroplasty: Editorial or governing board
  - Zimmer: IP royalties; Paid consultant; Stock or stock Options

- Craig Robert Mahoney, MD Submitted on: 04/01/2019
  - AAOS: Board or committee member
  - Iowa Orthopaedic Society: Board or committee member
  - Johnson & Johnson: Research support
  - Mercy Medical Center - Des Moines, Iowa: Board or committee member
  - Mid-America Orthopaedic Association: Board or committee member
  - Smith & Nephew: Research support
  - Trak Surgical, Inc.: Board or committee member; Stock or stock Options

- Donna Malert, CAE Submitted on: 04/02/2019
  - Abbott: IP royalties

- John Walter Mann III, MD Submitted on: 04/25/2019
  - Medacta: Paid consultant

- Pablo Marrero, MD Submitted on: 05/06/2019
  - Medicrea: Paid consultant

- Ernest B Marsolais, MD Submitted on: 04/08/2019
  - AAOS: Board or committee member
  - Orthopaedic Rehabilitation Association: Board or committee member

- Mickey Marsolais Submitted on: 05/17/2019
  - Orthopaedic Rehabilitation Association: Board or committee member
  - Spine, Journal of Spinal Cord Medicine, Archives of Physical Medicine: Editorial or governing board

- Yasseline Martinez (This individual reported nothing to disclose); Submitted on: 04/24/2019

- Michael M Marushack, MD (This individual reported nothing to disclose); Submitted on: 05/02/2019
2019 National Orthopaedic Leadership Conference - Full Meeting

- **Richard C Mather, III MD** Submitted on: 05/12/2019
  - Arthroscopy Association of North America: Board or committee member
  - KNG Health Consulting: Paid consultant
  - North Carolina Orthopaedic Association: Board or committee member
  - Reflexion Health: Research support
  - Stryker: Paid consultant
  - Zimmer: Research support

- **Elizabeth G Matzkin, MD** Submitted on: 04/19/2019
  - AAOS: Board or committee member
  - Arthrex, Inc: Paid presenter or speaker
  - Arthroscopy: Editorial or governing board
  - DePuy, A Johnson & Johnson Company: Paid consultant; Research support
  - Zimmer: Research support

- **Joel L Mayerson, MD** Submitted on: 04/04/2019
  - AAOS: Board or committee member
  - American Journal of Orthopedics: Editorial or governing board
  - Journal of Surgical Oncology: Editorial or governing board
  - Musculoskeletal Tumor Society: Board or committee member
  - National Comprehensive Cancer Network: Board or committee member
  - Ohio Orthopedic Society: Board or committee member
  - Onkos Surgical: Paid consultant

- **Stephen M McCollam, MD** Submitted on: 04/03/2019
  - American Society for Surgery of the Hand: Board or committee member
  - Journal of Hand Surgery - American: Editorial or governing board

- **Tyler Charles McDonald, MD** (This individual reported nothing to disclose); Submitted on: 04/26/2019

- **Jasmin L McGinty, MD** (This individual reported nothing to disclose); Submitted on: 05/14/2019

- **Louis F McIntyre, MD** Submitted on: 05/14/2019
  - AAOS: Board or committee member
  - Active Implants: Paid consultant
  - Advocacy for Improvement in Mobility: Board or committee member
  - Arthroscopy Association of North America: Board or committee member
  - Ceterix: Paid consultant
  - Delegate Medical Society of the State of New York: Board or committee member
  - Flexion: Paid consultant; Research support
  - Orthopedic Practice Management, Inc.: Board or committee member
  - Orthopedics Today: Editorial or governing board
  - OrthoSpace: Paid consultant
  - Smith & Nephew: Paid consultant; Paid presenter or speaker
  - Trice Medical: Paid consultant
  - Westchester County Medical Society: Board or committee member

- **Alfonso Mejia, MD, MPH** Submitted on: 04/30/2019
  - AALOS: Board or committee member
  - AAOS: Board or committee member
  - Acumed, LLC: Research support
  - Arthrex, Inc: Research support
  - IAOS: Board or committee member
  - Smith & Nephew: Research support
  - Synthes: Research support
2019 National Orthopaedic Leadership Conference - Full Meeting

- **Terri Mendez** (This individual reported nothing to disclose); Submitted on: 04/02/2019
- **Sidney Premer Migliori, MD** Submitted on: 04/25/2019
  - Past President RIOS: Board or committee member
  - RIOS BOC: Representative: Board or committee member
- **R Alden Milam, IV MD** Submitted on: 05/03/2019
  - AAOS: Board or committee member
  - Altum: Research support
  - AO Foundation: Other financial or material support
  - Cervical Spine Research Society: Board or committee member
  - Cutting Edge Spine: IP royalties
  - Fziomed: Research support
  - K2M: Paid consultant
  - Nuvasive: Other financial or material support
  - Spinal Kinetics: Research support
  - SpineWave: Paid consultant
  - Stryker: Paid consultant
- **Brian Miller, MD** (This individual reported nothing to disclose); Submitted on: 05/14/2019
- **Howard G Miller, MD** Submitted on: 05/06/2019
  - AL Orthopaedic Society: Board or committee member
- **Kerri Mink** (This individual reported nothing to disclose); Submitted on: 04/25/2019
- **Amir R Moinfar, MD** Submitted on: 04/26/2019
  - AAOS: Board or committee member
  - Maryland Orthopaedic Association: Board or committee member
  - Mitek Sports Medicine: Paid consultant; Paid presenter or speaker
- **Anthony V Mollano, MD** (This individual reported nothing to disclose); Submitted on: 05/06/2019
- **Stacie Monroe** (This individual reported nothing to disclose); Submitted on: 05/01/2019
- **Bryan Scott Moon, MD** Submitted on: 04/25/2019
  - AAOS: Board or committee member
  - Western Orthopaedic Association: Board or committee member
- **Randall C Morgan, Jr MD** Submitted on: 05/12/2019
  - Journal of Racial and Ethnic Health Disparities: Editorial or governing board
  - Zimmer: Paid consultant
- **Michael P Mott, MD** Submitted on: 04/15/2019
  - Musculoskeletal Transplant Foundation: Paid consultant
  - Musculoskeletal Tumor Society: Board or committee member
- **Eric Muehlbauer, CAE** Submitted on: 05/07/2019
  - National Association of Spine Specialists: Board or committee member
  - North American Spine Society: Board or committee member
- **Jayson Murray, MA** (This individual reported nothing to disclose); Submitted on: 04/26/2019
- **Samuel Edwin Murrell III, MD** Submitted on: 05/08/2019
  - AAOS: Board or committee member
  - Tennessee Orthopaedic Society: Board or committee member
  - Wright Medical Technology, Inc.: Stock or stock Options
2019 National Orthopaedic Leadership Conference - Full Meeting

- **Thomas S Muzzonigro, MD** Submitted on: 04/11/2019
  - AAOS: Board or committee member
  - Pennsylvania Orthopaedic Society: Board or committee member

- **Jeffrey M Nakano, MD** Submitted on: 04/25/2019
  - Colorado Orthopaedic Society Board member: Board or committee member
  - Flexion Therapeutics: Other financial or material support
  - Heron therapeutics: Other financial or material support
  - Western Orthopaedic Society: Board or committee member

- **Christopher Naso** Submitted on: 05/07/2019
  - Amgen Co: Stock or stock Options
  - Celgene: Stock or stock Options
  - Gilead: Stock or stock Options
  - Johnson & Johnson: Stock or stock Options
  - Pfizer: Stock or stock Options

- **Liz Neary** (This individual reported nothing to disclose); Submitted on: 04/08/2019

- **Graham Newson** (This individual reported nothing to disclose); Submitted on: 04/26/2019

- **Elizabeth McAllister Nolan, MD** Submitted on: 04/24/2019
  - American Orthopaedic Association: Board or committee member
  - American Shoulder and Elbow Surgeons: Board or committee member
  - Journal of Bone and Joint Surgery - American: Editorial or governing board
  - Journal of Shoulder and Elbow Surgery: Editorial or governing board
  - Ruth Jackson Orthopaedic Society: Board or committee member

- **David Jason Oberste, MD** Submitted on: 05/13/2019
  - Florida Orthopedic Society: Board or committee member

- **Matthew Oetgen, MD** Submitted on: 05/28/2019
  - AAOS: Board or committee member
  - Journal of the American Academy of Orthopaedic Surgeons: Editorial or governing board
  - Pediatric Orthopaedic Society of North America: Board or committee member
  - Scoliosis Research Society: Board or committee member

- **James Allen O'Leary, MD** Submitted on: 04/25/2019
  - Zimmer: Paid consultant

- **Robert M Orfaly, MD, FAAOS** Submitted on: 04/19/2019
  - AAOS: Board or committee member
  - Acumed, LLC: IP royalties
  - MicroAire Surgical Instruments LLC: Paid presenter or speaker
  - Oregon Association of Orthopaedic Surgeons: Board or committee member
  - Oregon Medical Association: Board or committee member

- **Kevin G Orrell, MD** Submitted on: 05/07/2019
  - Canadian Orthopaedic Association: Board or committee member

- **Jessell Owens, MD** (This individual reported nothing to disclose); Submitted on: 04/25/2019

- **Andrew J Palafox, MD** Submitted on: 04/29/2019
  - AAOS Board of Councilors: Board or committee member: Board or committee member
  - Del Sol Medical Center: Chief of Staff (elect): Board or committee member
  - Texas Orthopedic Association: Board or committee member: Board or committee member

- **Ayoosh Pareek, MD** (This individual reported nothing to disclose); Submitted on: 05/19/2019
2019 National Orthopaedic Leadership Conference - Full Meeting

- Om Patel, MD (This individual reported nothing to disclose); Submitted on: 05/02/2019
- Stephanie S Pearce, MD (This individual reported nothing to disclose); Submitted on: 04/29/2019
- Kevin D Plancher, MD, MPH, MS Submitted on: 05/22/2019
  American Association of Hip and Knee Surgeons: Board or committee member
  American Orthopaedic Society for Sports Medicine: Board or committee member
  American Shoulder and Elbow Surgeons: Board or committee member
  Arthroscopy Association of North America: Board or committee member
  Arthroscopy: The Journal of Arthroscopic & Related Surgery: Editorial or governing board
  Clinical Orthopaedics and Related Research: Editorial or governing board
  Eastern Orthopaedic Association: Board or committee member
  Medical Society of the State of New York: Board or committee member
  NY County Medical Society: Board or committee member
  Operative Techniques in Sports Medicine: Editorial or governing board
  Orthopaedic Research and Education Foundation: Board or committee member
  Techniques in Orthopaedics: Editorial or governing board
- Kenneth D Polivy, MD Submitted on: 04/25/2019
  Massachusetts Orthopaedic Association: Board or committee member
- Joshua Port, MD Submitted on: 05/07/2019
  AAOS: Board or committee member
  Arthrex, Inc: Research support
  Mid Atlantic Shoulder and Elbow Society: Board or committee member
  Pennsylvania Orthopedic Society: Board or committee member
- Patricia K Price Submitted on: 04/25/2019
  Indiana Orthopaedic Society: Board or committee member
- Anthony Priore (This individual reported nothing to disclose); Submitted on: 04/08/2019
- Bonhomme Joseph Prud'homme, MD Submitted on: 05/08/2019
  Arthrex, Inc: Research support
- Diane Przepiorski, Exec Dir Submitted on: 04/25/2019
  California Orthopaedic Association: Board or committee member
- Thomas Pulzone (This individual reported nothing to disclose); Submitted on: 05/02/2019
- Michael B Purnell, MD Submitted on: 05/07/2019
  Arthrex, Inc: IP royalties; Paid presenter or speaker
  California Orthopaedic Association: Board or committee member
  Shoulder Innovations: Unpaid consultant
- Gary W Pushkin, MD Submitted on: 05/06/2019
  AAOS: Board or committee member
  International Academy of Independent Medical Evaluators: Board or committee member
  Maryland Orthopaedic Association: Board or committee member
  MedChi, The Maryland State Medical Society: Board or committee member
- Robert H Quinn, MD Submitted on: 04/10/2019
  AAOS: Board or committee member
  Wilderness Medical Society: Board or committee member
- Anna Quintanilla (This individual reported nothing to disclose); Submitted on: 04/25/2019
2019 National Orthopaedic Leadership Conference - Full Meeting

- **Nicholas Rajacich, MD** Submitted on: 04/16/2019
  - board member: Board or committee member
  - Mary Bridge Childrens Hospital Foundation Board: Officer: Board or committee member
  - Pierce County Medical Society, board member: Board or committee member
  - Washington Medical PAC: Board or committee member
  - Washington State Orthopaedics Assn. Board member: Board or committee member

- **Rajiv Rajani, MD** Submitted on: 04/26/2019
  - AAOS: Board or committee member

- **Amar S Ranawat, MD** Submitted on: 05/13/2019
  - AAHKS: Board or committee member
  - AAOS: Board or committee member
  - Arthrex, Inc: Paid consultant
  - Ceramtec: Paid consultant; Research support
  - ConforMIS: Stock or stock Options
  - DePuy, A Johnson & Johnson Company: IP royalties; Other financial or material support; Paid consultant; Paid presenter or speaker; Research support
  - EOA: Board or committee member
  - Journal of Arthroplasty, CORR, JBJS: Editorial or governing board
  - Mako, Convatec: Paid presenter or speaker
  - NA: Publishing royalties, financial or material support
  - Strathspey Crown: Stock or stock Options
  - Stryker: IP royalties; Other financial or material support; Paid presenter or speaker; Research support
  - The Hip Society: Board or committee member
  - The Knee Society: Board or committee member

- **Raymond B Raven, MBA, MD** Submitted on: 04/25/2019
  - Advanced Orthopaedic Solutions: IP royalties
  - American Society for Surgery of the Hand: Board or committee member
  - Journal of Bone and Joint Surgery - American: Publishing royalties, financial or material support
  - Journal of Hand Surgery - American: Editorial or governing board; Publishing royalties, financial or material support
  - Osteomed: IP royalties

- **John Patrick Reilly, MD** (This individual reported nothing to disclose); Submitted on: 04/25/2019
  - Osteomed: IP royalties

- **William M Ricci, MD** Submitted on: 05/03/2019
  - Cable Fix LLC: Other financial or material support
  - CrookedFoot Medical LLC: Other financial or material support
  - Journal of Orthopaedic Trauma: Editorial or governing board
  - McGinley Orthopaedics: Other financial or material support
  - MicroPort: IP royalties
  - OKU Trauma/AAOS: Editorial or governing board
  - Orthopaedic Trauma Association: Board or committee member
  - OsteoCentric: Other financial or material support
  - Primo MC LLC: Other financial or material support
  - Rockwood & Green Fracture in Adults/Wolters Kluwer Health - Lippincott Williams & Wilkins: Editorial or governing board
  - Smith & Nephew: IP royalties; Paid consultant
  - Wolters Kluwer Health - Lippincott Williams & Wilkins: Publishing royalties, financial or material support
  - Zimmer-Biomet: Paid consultant

- **Lauren Pearson Riley** (This individual reported nothing to disclose); Submitted on: 05/10/2019
2019 National Orthopaedic Leadership Conference - Full Meeting

- **Vytautas M Ringus, MD** (This individual reported nothing to disclose); Submitted on: 05/21/2019
- **Marco Rizzo, MD** Submitted on: 04/25/2019
  - American Association for Hand Surgery: Board or committee member
  - Journal of wrist surgery: Editorial or governing board
  - Synthes: Unpaid consultant
  - Zimmer: Paid consultant
- **Ricardo J Rodriguez, MD** Submitted on: 05/06/2019
  - AAOS: Board or committee member
  - Clinical Orthopaedic Society: Board or committee member
  - Louisiana Orthopaedic Association: Board or committee member
  - SIGHT Medical: Stock or stock Options
  - Smith & Nephew: IP royalties
- **Mark J Romness, MD** Submitted on: 05/14/2019
  - AAOS: Board or committee member
  - Orthofix, Inc.: Paid consultant
  - Virginia Orthopaedic Society: Board or committee member
- **Benjamin N Rosenberg, MD** Submitted on: 04/25/2019
  - ConforMIS: Stock or stock Options
- **Paul T Rubery Jr, MD** Submitted on: 04/11/2019
  - Johnson & Johnson: Stock or stock Options
- **Anthony J Russo, MD** Submitted on: 05/14/2019
  - Globus Medical: Paid consultant; Paid presenter or speaker; Research support
  - Orthofix, Inc.: Paid consultant; Paid presenter or speaker; Research support
  - Surgente: Paid consultant
- **Adrian B Ryan, MD** (This individual reported nothing to disclose); Submitted on: 05/02/2019
- **Katherine Sale** (This individual reported nothing to disclose); Submitted on: 04/10/2019
- **Andrew T Saltzman, MD** Submitted on: 04/27/2019
  - AAOS BOC: Board or committee member
  - Indiana Orthopaedic Society: Board or committee member
  - Vanderburgh County Medical Society: Board or committee member
- **Julie B Samora, MD** Submitted on: 04/05/2019
  - AAOS: Board or committee member
  - American Society for Surgery of the Hand: Board or committee member
  - Globus Medical: Paid consultant
  - Pediatric Orthopaedic Society of North America: Board or committee member
  - Ruth Jackson Orthopaedic Society: Board or committee member
- **C Craig Satterlee, MD** Submitted on: 05/07/2019
  - AAOS: Board or committee member
  - Zimmer: Employee
- **James Matthew Saucedo, MD, MBA** Submitted on: 04/27/2019
  - American Society for Surgery of the Hand: Board or committee member
  - Edge Surgical: Stock or stock Options
  - Hely Weber: IP royalties
  - Trimed: Paid presenter or speaker; Unpaid consultant
- **Kenneth Schmidt, MD** (This individual reported nothing to disclose); Submitted on: 05/10/2019
2019 National Orthopaedic Leadership Conference - Full Meeting

- **Todd A Schmidt, MD** Submitted on: 04/28/2019  
  AAOS: Board or committee member  
  Georgia Orthopaedic Society: Board or committee member

- **Matthew R Schmitz, MD** Submitted on: 04/20/2019  
  AAOS: Board or committee member  
  American Academy of Pediatrics - Section on Orthopaedics: Board or committee member  
  Elsevier: Publishing royalties, financial or material support  
  HitCheck: Stock or stock Options  
  Journal of Bone and Joint Surgery - American: Editorial or governing board  
  Pediatric Orthopaedic Society of North America: Board or committee member  
  Pediatric Research in Sports Medicine: Board or committee member  
  Society of Military Orthopaedic Surgeons: Board or committee member

- **Anthony James Scillia, MD** Submitted on: 04/04/2019  
  ISO-biologics: Research support  
  Mitek: Paid consultant  
  New Jersey orthopaedic society: Board or committee member

- **Kaitlyn Sevarino, MBA** (This individual reported nothing to disclose); Submitted on: 05/24/2019

- **William Shaffer** (This individual reported nothing to disclose); Submitted on: 04/11/2019

- **Timothy J Shannon, MD** Submitted on: 04/30/2019  
  South Carolina Orthopedic Association: Board or committee member

- **Neil P Sheth, MD** Submitted on: 04/24/2019  
  AAOS: Board or committee member  
  Elsevier: Publishing royalties, financial or material support  
  Medacta: Paid consultant  
  Smith & Nephew: Paid consultant  
  Zimmer: Paid consultant

- **Kevin B Shrock, MD** Submitted on: 05/14/2019  
  AAOS: Board or committee member  
  Allergan: Stock or stock Options  
  Celgene: Stock or stock Options  
  Florida Orthopaedic Society: Board or committee member  
  Galderma: Research support  
  Gilead Sciences: Stock or stock Options  
  Histogenics: Research support  
  Pfizer: Stock or stock Options  
  Trevena: Stock or stock Options

- **Micah Katherine Sinclair, MD** (This individual reported nothing to disclose); Submitted on: 04/30/2019

- **Alan Skipper** (This individual reported nothing to disclose); Submitted on: 04/30/2019

- **Diane Slaughter** Submitted on: 05/08/2019  
  West Virginia Orthopaedic Society: Board or committee member

- **James A Slough, MD** Submitted on: 04/23/2019  
  Johnson & Johnson: Stock or stock Options  
  New York State Society of Orthopaedic Surgeons Board: Board or committee member  
  Stryker: Stock or stock Options  
  Teva Pharmaceutical: Stock or stock Options

- **Cory Daniel Smith, MD** (This individual reported nothing to disclose); Submitted on: 05/09/2019
2019 National Orthopaedic Leadership Conference - Full Meeting

- **Barry J Snyder, MD** Submitted on: 04/27/2019
  - AAOS: Board or committee member
  - Bristol-Myers Squibb: Stock or stock Options
  - Pennsylvania Orthopaedic Society: Board or committee member
  - Philadelphia Orthopaedic Society: Board or committee member

- **Matthew J Snyder, MD** Submitted on: 04/19/2019
  - Indiana Orthopaedic Society: Board or committee member

- **Sean Spence, MD** (This individual reported nothing to disclose); Submitted on: 05/01/2019

- **Teri L Stech** (This individual reported nothing to disclose); Submitted on: 05/06/2019

- **Scott P Steinmann, MD** Submitted on: 04/22/2019
  - Acumed, LLC: Paid consultant
  - American Shoulder and Elbow Surgeons: Board or committee member
  - American Society for Surgery of the Hand: Board or committee member
  - Arthrex, Inc: IP royalties; Paid consultant
  - Arthroscopy Association of North America: Board or committee member
  - Biomet: IP royalties; Paid consultant
  - Journal of Hand Surgery - American: Editorial or governing board
  - Journal of Shoulder and Elbow Surgery: Editorial or governing board
  - Orthopedics Today: Editorial or governing board

- **Joseph J Stuart, MD** Submitted on: 05/06/2019
  - AAOS: Board or committee member
  - Society of Military Orthopaedic Surgeons: Board or committee member

- **Justin Stull, MD** (This individual reported nothing to disclose); Submitted on: 04/09/2019

- **Juan C Suarez, MD** Submitted on: 04/17/2019
  - Arthroplasty Today: Editorial or governing board
  - Corin U.S.A.: IP royalties
  - DePuy, A Johnson & Johnson Company: Paid presenter or speaker

- **Keri Talcott** (This individual reported nothing to disclose); Submitted on: 04/23/2019

- **Stanley S Tao, MD** Submitted on: 05/07/2019
  - Eli Lilly: Stock or stock Options
  - Merck: Stock or stock Options
  - West Virginia Orthopedic Society, Cabell County Medical Society: Board or committee member

- **Constance Thorsen** (This individual reported nothing to disclose); Submitted on: 04/29/2019

- **Thomas Ward Throckmorton, MD** Submitted on: 04/01/2019
  - AAOS: Board or committee member
  - Exactech, Inc: IP royalties
  - Gilead: Stock or stock Options
  - Saunders/Mosby-Elsevier: Publishing royalties, financial or material support
  - Zimmer: IP royalties

- **Pietro M Tonino, MD** Submitted on: 04/25/2019
  - AAOS: Board or committee member
  - Arthroscopy Association of North America: Board or committee member
  - CONMED Linvatec: Paid consultant
  - Illinois Association of Orthopaedic Surgeons: Board or committee member
  - NCS: Paid consultant
  - Regeneration Technologies, Inc.: Stock or stock Options
2019 National Orthopaedic Leadership Conference - Full Meeting

- **Daniel Torres, MD** (This individual reported nothing to disclose); Submitted on: 05/07/2019
- **Laura Lowe Tosi, MD** Submitted on: 04/10/2019
  - American Bone Health: Board or committee member
  - American Orthopaedic Association: Board or committee member
  - Journal of Children's Orthopaedics: Editorial or governing board
  - Osteogenesis Imperfecta Foundation: Board or committee member
  - US Bone & Joint Initiative: Board or committee member
- **Peter F Townsend, MD** Submitted on: 04/27/2019
  - President, Delaware Society of Orthopaedic Surgeons: Board or committee member
- **Anna Salt Troise** (This individual reported nothing to disclose); Submitted on: 05/16/2019
- **Eeric Truumees, MD** Submitted on: 04/25/2019
  - AAOS: Board or committee member
  - AAOS Now: Editorial or governing board
  - American Orthopaedic Association: Board or committee member
  - Dova Pharmaceuticals: Research support
  - Journal of Bone and Joint Surgery - American: Editorial or governing board
  - Journal of the American Academy of Orthopaedic Surgeons: Editorial or governing board
  - Medtronic Sofamor Danek: Research support
  - North American Spine Society: Board or committee member; Publishing royalties, financial or material support
  - Pfizer: Research support
  - Relievant: Research support
  - Spine: Editorial or governing board
  - Stryker: Research support
  - The Spine Journal: Editorial or governing board
  - Vertex Pharmaceuticals: Research support
- **Jerry W Van Meter, MD** Submitted on: 04/30/2019
  - Hawaii Medical Association: Board or committee member
  - Hawaii Orthopaedic Association: Board or committee member
  - Honolulu County Medical Society: Board or committee member
- **Jordan Vivian** (This individual reported nothing to disclose); Submitted on: 04/30/2019
- **Christopher J Walsh, MD** Submitted on: 04/09/2019
  - Georgia Orthopaedic Society: Board or committee member
  - Georgia Society for Ambulatory Surgery Centers: Board or committee member
- **Kristy L Weber, MD** Submitted on: 05/05/2019
  - AAOS: Board or committee member
  - T-munity: Research support
  - Wolters Kluwer Health - Lippincott Williams & Wilkins: Publishing royalties, financial or material support
- **Brandon G. Wilkinson, MD** (This individual reported nothing to disclose); Submitted on: 05/06/2019
- **Claude Somers Williams, MD** Submitted on: 05/11/2019
  - Louisiana Orthopaedic Association - Board of Directors: Board or committee member
- **Julia Williams** (This individual reported nothing to disclose); Submitted on: 05/01/2019
- **James C Wittig, MD** (This individual reported nothing to disclose); Submitted on: 05/17/2019
2019 National Orthopaedic Leadership Conference - Full Meeting

- Megan Rianne Wolf, MD Submitted on: 04/11/2019
  AAOS: Board or committee member
  Medtronic: Employee

- Jessica A Woodcock, MD (This individual reported nothing to disclose); Submitted on: 05/09/2019

- Robert James Woodruff, MD Submitted on: 04/23/2019
  Zyga: Research support

- Shane Kelby Woolf, MD Submitted on: 04/10/2019
  Charleston County Medical Society: Board or committee member
  Exactech, Inc - clinical evaluator (shoulder system): Unpaid consultant
  Musculoskeletal Transplant Foundation: Other financial or material support
  South Carolina Orthopaedic Association: Board or committee member

- Rory R Wright, MD Submitted on: 04/10/2019
  AAOS: Board or committee member
  Wisconsin Orthopedic Society BOD: Board or committee member

- Adolph J Yates Jr, MD Submitted on: 04/25/2019
  AAOS: Board or committee member
  American Association of Hip and Knee Surgeons: Board or committee member
  American Society of Hematologists: Board or committee member
  Journal of Arthroplasty: Editorial or governing board
  Journal of Bone and Joint Surgery - American: Editorial or governing board
  Orthoworld: Paid presenter or speaker
  Zimmer: Paid presenter or speaker

- Melissa Young, JD (This individual reported nothing to disclose); Submitted on: 05/07/2019

- Diane Ziegenhorn (This individual reported nothing to disclose); Submitted on: 05/20/2019
ADVOCACY TRACK-Wednesday and Thursday

- **Brandon James Barnes, MD** (This individual reported nothing to disclose); Submitted on: 05/01/2019
- **Surajudeen Adebola Bolarinwa, MD** (This individual reported nothing to disclose); Submitted on: 04/25/2019
- **James Turner Brown, MD** (This individual reported nothing to disclose); Submitted on: 05/29/2019
- **Felix Ho-Ming Cheung, MD** Submitted on: 05/18/2019
  
  Biomet: Research support
  
  West Virginia Orthopaedic Society: Board or committee member

- **Matthew Joseph Deasey, MD** (This individual reported nothing to disclose); Submitted on: 05/28/2019

- **Kent Doan, MD** (This individual reported nothing to disclose); Submitted on: 05/14/2019

- **Michael Faloon, MD** Submitted on: 04/10/2019
  
  AAOS: Board or committee member
  
  K2M: Paid presenter or speaker; Research support
  
  North American Spine Society: Board or committee member
  
  Scoliosis Research Society: Board or committee member

- **Thomas A Fortney, MD** (This individual reported nothing to disclose); Submitted on: 05/17/2019

- **Marisa Francis** (This individual reported nothing to disclose); Submitted on: 04/06/2019

- **John Marshal Froelich, MD** Submitted on: 05/16/2019
  
  American Society for Surgery of the Hand: Board or committee member
  
  Colorado Orthopaedic Society: Board or committee member
  
  Osteomed: Paid presenter or speaker

- **James T Guille, MD** Submitted on: 04/30/2019
  
  Anthracite Orthopaedics: Paid consultant
  
  Board Member, Pennsylvania Orthopaedic Society: Board or committee member
  
  Orthopedics: Editorial or governing board
  
  Past President, Eastern Orthopaedic Association: Board or committee member
  
  President, Philadelphia Orthopaedic Society: Board or committee member

- **Dean Holzkamp** Submitted on: 05/16/2019
  
  Colorado Medicine, the official magazine of the Colorado Medical Society: Editorial or governing board

- **Michael Douglas Hunter, MD** (This individual reported nothing to disclose); Submitted on: 05/06/2019

- **Joel James** Submitted on: 05/09/2019
  
  AAOE (formerly BONES Society): Board or committee member

- **Adam Joshua Kopiec, MD** (This individual reported nothing to disclose); Submitted on: 05/21/2019

- **Cyrus S Kump, MD** (This individual reported nothing to disclose); Submitted on: 05/29/2019

- **Steve Landerman** Submitted on: 04/01/2019
  
  Ohio Orthopaedic Society: Board or committee member

- **Denise Lantz** (This individual reported nothing to disclose); Submitted on: 05/06/2019

- **Hao Li, MD** (This individual reported nothing to disclose); Submitted on: 05/01/2019
ADVOCACY TRACK-Wednesday and Thursday

- **Douglas W Lundy, MD, MBA** Submitted on: 04/25/2019
  AAOS: Board or committee member
  AAOS Now: Editorial or governing board
  American Board of Orthopaedic Surgery, Inc.: Board or committee member
  American Orthopaedic Association: Board or committee member
  Clinical Orthopaedics and Related Research: Editorial or governing board
  Journal of Orthopaedic Trauma: Editorial or governing board
  Journal of the Southern Medical Association: Editorial or governing board
  Orthopaedic Trauma Association: Board or committee member
  Orthopedics: Editorial or governing board
  Synthes: Paid presenter or speaker

- **Andrew Mann** (This individual reported nothing to disclose); Submitted on: 04/25/2019

- **David C Markel, MD** Submitted on: 04/17/2019
  Arboretum Ventures: Stock or stock Options
  Ascension Providence Hospital: Research support
  Clinical Orthopaedics and Related Research: Editorial or governing board
  Halyard: Paid presenter or speaker
  Journal of Arthroplasty: Editorial or governing board
  Journal of Bone and Joint Surgery - American: Editorial or governing board
  Michigan Arthroplasty Registry Collaborative Quality Initiative: Board or committee member
  Michigan Orthopaedic Society, aahks, mid america ortho assoc: Board or committee member
  OREF: Research support
  Osteoarthritis and Cartilage: Editorial or governing board
  Stryker: IP royalties; Paid consultant; Paid presenter or speaker; Research support
  The CORE institute: Stock or stock Options
  US Veteran Administration: Research support

- **John J McGraw, MD** Submitted on: 04/30/2019
  AAOS: Board or committee member
  AAOS Now: Editorial or governing board
  Board member & Medical Director SecureCare malpractice insurance Corp.: Employee
  Corazon Consulting, Paid Consultant: Employee

- **Daniel K Moon, MD, MBA** Submitted on: 05/06/2019
  American Orthopaedic Foot and Ankle Society: Board or committee member

- **Ronald Anthony Navarro, MD** Submitted on: 04/09/2019
  AAOS: Board or committee member
  American Board of Orthopaedic Surgery, Inc.: Board or committee member
  American Orthopaedic Association: Board or committee member
  American Shoulder and Elbow Surgeons: Board or committee member
  California Orthopaedic Association: Board or committee member

- **Joe Aryeh Rosenbaum, MD** (This individual reported nothing to disclose); Submitted on: 04/30/2019

- **Susan Schaffman** (This individual reported nothing to disclose); Submitted on: 04/04/2019

- **Kalpit Nimish Shah, MD** Submitted on: 04/03/2019
  AAOS: Board or committee member
  American Society for Surgery of the Hand: Board or committee member
Public Disclosure Information
for Meeting Registrants

ADVOCACY TRACK-Wednesday and Thursday

- **Samantha A Spencer, MD** Submitted on: 04/29/2019
  - AAOS: Board or committee member
  - AO Trauma: Paid presenter or speaker
  - Children's Orthopaedic Surgery Foundation: Board or committee member
  - DePuy, A Johnson & Johnson Company: Paid presenter or speaker
  - Journal of Pediatric Orthopedics: Editorial or governing board
  - Massachusetts Orthopaedic Association: Board or committee member
  - Michigan Medical Alumni Society: Board or committee member
  - Pediatric Orthopaedic Society of North America: Board or committee member
  - Skeletal Dysplasia Meeting Consortium: Board or committee member

- **Shafic A Sraj, MD** Submitted on: 04/01/2019
  - AAOS: Board or committee member
  - WV medical Journal: Editorial or governing board
  - WV orthopaedic society: Board or committee member
  - WV State Medical Association: Board or committee member

- **Walter Stanwood, MD** Submitted on: 05/05/2019
  - Catalyst: Stock or stock Options
  - Lima: Paid consultant
  - Massachusetts Orthopaedic Association: Board or committee member
  - Mininvasive: Paid consultant; Stock or stock Options
  - Surgical Innovations: IP royalties

- **LeeAnne Feher Torres, MD** (This individual reported nothing to disclose); Submitted on: 05/13/2019

- **Erin Volland** (This individual reported nothing to disclose); Submitted on: 05/08/2019

- **Eric Ferguson Walsh, MD** Submitted on: 04/25/2019
  - Rhode Island Orthopedic Society: Board or committee member

- **P Merrill White, MD** Submitted on: 04/30/2019
  - Medtronic: Employee
  - Past President of the Tennessee Orthopaedic Society: Board or committee member

- **Caleb Yeung, MD** (This individual reported nothing to disclose); Submitted on: 04/15/2019
The American Academy of Orthopaedic Surgeons and the American Association of Orthopaedic Surgeons (collectively “AAOS”) expects all of its volunteers and its employees to act in accordance with the highest standards of personal and professional integrity in all aspects of their activities; to comply with all applicable laws, rules, and regulations; to deter wrongdoing; and to abide by all duly adopted AAOS policies and procedures. This AAOS Code of Ethics applies to members of the Board of Directors, Council or Cabinet Chairs, Advisory Board Chairs, Committee Chairs, the Executive Management Team, and the Senior Management Team.

This AAOS Code of Ethics is intended to supplement the AAOS Standards of Professionalism and Code of Medical Ethics and Professionalism for Orthopaedic Surgeons (for orthopaedic volunteers) and the most recent edition of the AAOS Personnel Policy Manual (for AAOS employees).

Those to whom this AAOS Code of Ethics applies agree to:

- Engage in and promote honest and ethical conduct, including the ethical handling of actual and potential conflicts of interest between personal and professional relationships;
- Recognize conflicts of interest and disclose to the Board of Directors, Council/Cabinet, or Executive Management Team (as appropriate for your position) and to the Committee on Outside Interests any material transactions or relationships that reasonably could be expected to give rise to such conflicts;
- Respect the confidentiality of information acquired in the course of your duties;
- Provide colleagues with information that is accurate, complete, objective, relevant, timely and understandable;
- Comply with applicable laws, rules and regulations of federal, state and local governments;
- Act in good faith, with due care, competence, and diligence, without misrepresenting material facts or allowing independent judgment to be subordinated;
- Assure the responsible use of and control of all assets, resources, and information in the possession of the AAOS and related organizations; and
- Promptly refer any questions about or any alleged violations of this Code of Ethics to the President of the AAOS.

The AAOS Board of Directors shall have the discretionary authority to approve any deviation or waiver from this AAOS Code of Ethics and shall determine what action, if any, is appropriate for any real or alleged violation.

Adopted: June 2004
Revised: December 2014
Discussions at meetings of the American Academy of Orthopaedic Surgeons and the American Association of Orthopaedic Surgeons (collectively “AAOS”) often cover a broad range of topics pertinent to the interests or concerns of orthopaedic surgeons. As a general rule, except as noted below, discussions at AAOS meetings can address virtually any topic without raising antitrust concerns if the discussions are kept scrupulously free of even the suggestion of private regulation of the profession. However, a number of topics that might be (and have been) discussed at AAOS meetings may raise significant complex antitrust concerns. These include:

- Membership admissions, rejections, restrictions, and terminations;
- Professional compliance actions – reprimands, censures, suspensions and expulsions;
- Adoption of and revisions to Standards of Professionalism;
- Method of provision and sale of AAOS products and services to non-members;
- Restrictions in the selection and requirements for exhibitors at the AAOS Annual Meeting or in CME activities;
- Collecting and distributing certain orthopaedic practice information, particularly involving practice charges and costs;
- Obtaining and distributing orthopaedic industry price and cost information;
- Professional certification programs;
- Group buying and selling; and
- Inclusions or exclusion of other medical societies in organizational activities or offerings.

When these and related topics are discussed, the convener or members of the AAOS group should seek counsel from the AAOS Office of General Counsel.

AAOS staff has been trained to identify potential antitrust matters. The AAOS relies on the judgment of its staff regarding these matters. AAOS urges its Board, committees and other groups not to participate in discussions that may give the appearance of or constitute an agreement that would violate the antitrust laws.
Notwithstanding this reliance, it is the responsibility of each AAOS Board or committee member to avoid raising improper subjects for discussion. This reminder has been prepared to ensure that AAOS members and other participants in AAOS meetings are aware of this obligation.

The “Do Not’s” and “Do’s” presented below highlight only the most basic antitrust principles that may come before medical associations, like AAOS. AAOS members and staff participating in AAOS meetings should consult with the AAOS Office of General Counsel in all cases involving specific questions, interpretations or advice regarding antitrust matters.

Do Nots

1. Do not, in fact or appearance, discuss or exchange information regarding:
   a. Individual company prices, price changes, price differentials, mark-ups, discounts, allowances, credit terms, etc. or any other data that may bear on price, such as costs, production, capacity, inventories, sales, etc.
   b. Raising, lowering or “stabilizing” orthopaedic prices or fees;
   c. What constitutes a fair profit or margin level;
   d. The availability of products or services;
   e. The allocation of markets, territories or patients.

2. Do not suggest or imply that AAOS members should or should not deal with certain other persons or firms.

3. Do not foster unfair practices regarding advertising, standardization, certification or accreditation.

4. Do not discuss or exchange information regarding the above matters during social gatherings, incidental to AAOS-sponsored meetings.

5. Do not make oral or written statements on important issues on behalf of AAOS without appropriate authority to do so.

Do

1. Do adhere to prepared agenda for all AAOS meetings, ideally distributed in advance. Agendas should be sufficiently detailed to disclosure the nature of the discussions to be held. It is generally permissible for agendas to include discussions of such varied topics as professional economic trends, advances and problems in relevant technology or research, various aspects of the science and art of management, and relationships with local, state or federal governments.
2. Do require that a member of the AAOS professional staff participate in every AAOS meeting, either in person or by conference call. If any meeting is expected to deal with sensitive competitive issues, counsel from the AAOS Office of General Counsel should ordinarily be present. Committee staff should consult with AAOS legal counsel to determine whether the presence of counsel is advisable. If AAOS legal counsel is not at the meeting, members and staff should not hesitate to consult the AAOS Office of General Counsel as necessary.

3. Do ensure that a record of all meeting, consisting of formal minutes or a memo to the file, should be made by AAOS committee staff.

4. Do object whenever meeting summaries do not accurately reflect the matters that occurred.

5. Do consult with AAOS counsel on all antitrust questions relating to discussions at AAOS meetings.

6. Do object to and do not participate in any discussions or meeting activities that you believe violate the antitrust laws; dissociate yourself from any such discussions or activities and leave any meeting in which they continue.

**Special Guidelines for Collecting and Distributing Information**

The collection and distribution of information regarding business practices is a traditional function of associations and is well-recognized under the law as appropriate, legal and consistent with the antitrust laws. However, if conducted improperly, such information gathering and distributing activities might be viewed as facilitating an express or implied agreement among association members to adhere to the same business practices. For this reason, special general guidelines have developed over time regarding association’s reporting on information collected from and disseminated to members. Any exceptions to these general guidelines should be made only after discussion with the AAOS Office of General Counsel. These general guidelines include:

1. Member participation in the statistical reporting program is voluntary. The statistical reporting program should be conducted without coercion or penalty. Non-members should be allowed to participate in the statistical reporting program if eligible; however, if there is a fee involved, they may be charged a reasonably higher fee than members.

2. Information should be collected via a written instrument that clearly sets forth what is being requested.

3. The data that is collected should be about past transactions or activities;
particularly if the survey deals with prices and price terms (including charges, costs, wages, benefits, discounts, etc.), it should be historic, i.e., more than three months old.

4. The data should be collected by either the AAOS or an independent third party not connected with any one member.

5. Data on individual orthopaedic surgeons should be kept confidential.

6. There should be a sufficient number of participants to prevent specific responses or data from being attributable to any one respondent. As a general rule, there should be at least five respondents reporting data upon which any statistic or item is based, and no individual’s data should represent more than 25% on a weighted average of that statistic or item.

7. Composite/aggregate data should be available to all participants – both members and non-members. The data may be categorized, e.g., geographically, and ranges and averages may be used. No member should be given access to the raw data. Disclosure of individual data could serve to promote uniformity and reduce competition.

8. As a general rule, there should be no discussion or agreement as to how members should adjust, plan or carry out their practices based on the results of the survey. Each member should analyze the data and make business decisions independently.

CONCLUSION

This reminder has been written to avoid any violation of the law by AAOS members and staff and any activity that might give the appearance of illegality. However, no set of guidelines can address every possible type of inappropriate or unlawful activity. AAOS members and staff should use careful judgment to identify situation where AAOS activities, or discussions at AAOS-sponsored meetings, may violate federal or state law or may be perceived as doing so. In those cases, it is the responsibility of the member and staff to avoid these situations and consult with the AAOS Office of General Counsel when necessary.

Adopted: June 2005
Revised: December 2014
CME CREDIT FOR
2019 AAOS NOLC

The American Academy of Orthopaedic Surgeons is accredited by the Accreditation Council for Continuing Medical Education to provide continuing medical education for physicians.

The American Academy of Orthopaedic Surgeons designates this live activity for a maximum of 6 AMA PRA Category 1 Credits™. Physicians should claim only the credit commensurate with the extent of their participation in the activity.

Disclosure Information for AAOS 2019 NOLC Planning Group:

Kristy L Weber, MD Submitted on: 05/05/2019
AAOS: Board or committee member
T-munity: Research support
Wolters Kluwer Health - Lippincott Williams & Wilkins: Publishing royalties, financial or material support

Robert M Orfaly, MD, FAAOS Submitted on: 04/19/2019
AAOS: Board or committee member
Acumed, LLC: IP royalties
MicroAire Surgical Instruments LLC: Paid presenter or speaker
Oregon Association of Orthopaedic Surgeons: Board or committee member
Oregon Medical Association: Board or committee member

Dirk H Alander, MD, MHA Submitted on: 04/29/2019
AAOS: Board or committee member

Elizabeth G Matzkin, MD Submitted on: 04/19/2019
AAOS: Board or committee member
Arthrex, Inc: Paid presenter or speaker
Arthroscopy: Editorial or governing board
DePuy, A Johnson & Johnson Company: Paid consultant; Research support
Zimmer: Research support

Thomas Ward Throckmorton, MD Submitted on: 04/01/2019
AAOS: Board or committee member
Exactech, Inc: IP royalties
Gilead: Stock or stock Options
Saunders/Mosby-Elsevier: Publishing royalties, financial or material support
Zimmer: IP royalties

Staff:
Donna Malert, CAE Submitted on: 04/02/2019
Abbott: IP royalties

Symposium I: Core Values
Friday, June 7, 2019, 10:45 AM – 11:45 AM
Symposium II: Advocacy
Friday, June 7, 2019, 1:00 PM – 3:00 PM

Moderator:
Wilford K Gibson, MD Submitted on: 04/19/2019
AAOS: Board or committee member
AAOS Now: Editorial or governing board

Speakers:
Wilford K Gibson, MD Submitted on: 04/19/2019
AAOS: Board or committee member
AAOS Now: Editorial or governing board

M Bradford Henley, MD, MBA, FACS Submitted on: 04/30/2019
AAOS: Board or committee member
Renovis: IP royalties
Renovis (formerly Synergy Surgical Technologies): Stock or stock Options

CME Credit for 2019 NOLC
Symposium III: Leadership
Friday, June 7, 2019, 3:15 PM – 4:15 PM

Moderator:
Joseph A Bosco, III MD Submitted on: 04/20/2019
Genovel: Stock or stock Options
Proventus Health: Stock or stock Options
Relative Risk Solutions: Stock or stock Options

Speakers:
Thomas C Barber, MD Submitted on: 05/08/2019
Clarify: Stock or stock Options
Clarify Health: Unpaid consultant
Sharp Fluidics: Stock or stock Options

Dirk H Alander, MD, MHA Submitted on: 04/29/2019
AAOS: Board or committee member

Robert M Orfaly, MD, FAAOS Submitted on: 04/19/2019
AAOS: Board or committee member
Acumed, LLC: IP royalties
MicroAire Surgical Instruments LLC: Paid presenter or speaker
Oregon Association of Orthopaedic Surgeons: Board or committee member
Oregon Medical Association: Board or committee member

Symposium IV: Quality and Value
Friday, June 8, 2019, 8:00 AM – 10:00 AM

Moderator/Speaker:
Robert H Quinn, MD Submitted on: 04/10/2019
AAOS: Board or committee member
Wilderness Medical Society: Board or committee member
Travel Policy for National Orthopaedic Leadership Conference (NOLC)
Notices

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This document was written and produced by:
American Academy of Orthopaedic Surgeons
9400 West Higgins Road
Rosemont, Illinois 60018-4976
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<tr>
<td>April 19, 2019</td>
<td>Donna Malert</td>
<td>NOLC Travel Policy updated for 2019</td>
<td>0.1</td>
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</tbody>
</table>
1 Introduction
This document outlines the AAOS travel policy for volunteers and staff to the 2019 NOLC. (Travel guidelines for members of the Board of Directors and the Council and Cabinet Chairs are outlined in a separate policy.)

The AAOS recognizes that volunteers give generously of their time and spend time away from their practices to participate in AAOS events. When this dedication is added to the fact that more than 3,000 trips are made by AAOS volunteers in the course of a year, it becomes paramount that the AAOS travel policy be fair, consistent, and easily understandable. In addition, it must provide for prompt and accurate reimbursement of expenses incurred. Finally, it must fulfill certain obligations required by the Internal Revenue Service (IRS) and also adhere to principles of prudent management.

2 Air Travel
Travelers are strongly encouraged to use CorpTrav, AAOS’ official travel agent, to make their travel arrangements for AAOS business. In doing so, the airfare and agent fees are charged directly to the AAOS, though travelers retain any reward miles that may apply. Round-trip travel should be booked on one airline whenever possible (the same airline going and returning). If a ticket exceeds $600, CorpTrav will contact the AAOS Travel Specialist to determine authorization of the requested ticket.

Discounted, non-refundable and non-transferable coach class tickets for scheduled meetings should be purchased at least 21 days prior to travel, as this generally will yield the lowest fare available. Non-refundable does not mean that the ticket can’t be changed. If a non-refundable ticket is cancelled, CorpTrav will receive credit for the cost of the ticket, to be applied to future travel for the same individual on the same airline.

The fee to book the ticket is $12 if the ticket is purchased online and $32 if acquired over the phone – i.e., agent-assisted booking. There is an additional $15 charge for agent-assisted booking if done between 7:00 pm-7:00 am.

The AAOS will reimburse for checked bags up to a two bag maximum. Overweight baggage fees will not be reimbursed. Flight changes will be reimbursed up to $200 per round trip. Use of a private airplane is strongly discouraged due to liability issues as the AAOS’ insurance will neither cover the volunteer traveling aboard a private airplane on AAOS business nor will the AAOS.

3 Flight Upgrades
Upgrade purchases are not reimbursable, including upgrades to Economy Plus.
4 International Flights
Volunteers traveling on behalf of the AAOS can travel Business Class on all international trips. (For purposes of this policy, flights to/from Canada, Hawaii and Alaska are considered domestic.)

5 E-Tickets Vs. Paper Tickets
Please avoid requesting paper tickets when making travel arrangements. The airlines have created interlining agreements (to facilitate flight changes that occur because of aircraft delays or weather problems) that have diminished the usefulness of paper tickets. In addition to the $50 fee for issuing paper tickets, there also is a charge to send the ticket via express mail services. If a ticket is lost, there is an additional fee to replace it. If the ticket is unused, it must be returned to CorpTrav, who will charge a fee to refund the unused ticket.

6 Automobile Travel
The AAOS will reimburse individuals traveling to/from the NOLC via personal automobile at the published IRS rate per mile ($0.58 per mile effective 01/01/19). If a personal vehicle is used in lieu of airline travel, mileage reimbursement may not exceed the cost of the commercial 21-day discounted Coach airfare. Automobile rental for travel in conjunction with the NOLC is prohibited. Hotel shuttle vans and taxis are the preferred mode of ground travel.

7 Train
Train fares may not exceed the cost of a commercial 21-day discounted coach airfare. Only coach train fares are reimbursed.

Upgrade purchases are not reimbursable.

8 Travel Insurance
Travel insurance is not reimbursable.

9 Hotel/Lodging
Lodging accommodations should be made at the host hotel, the JW Marriott Hotel in Washington, DC. Hotel rooms within the JW Marriott Hotel, during the meeting’s dates, will be charged directly to the AAOS. Secure lodging prior to the release of the AAOS Room Block on May 14, 2019 (subject to availability) to avoid registration at another hotel. Stays at other area hotels will be reimbursed at the JW Marriott Hotel contract rate of $309 per night, or the traveler’s hotel, whichever rate is less expensive. Transportation costs between the host hotel and area hotels are not reimbursable.

If you elect to attend the Media Training session on Wednesday, June 5, 2019, and need to arrive Tuesday, June 4, you are responsible for any additional hotel nights and other costs.
10 Meals and Beverages
AAOS will reimburse individuals for meals, beverages, and snacks in conjunction with official AAOS business at a rate of up to $75 per day during the NOLC dates. The AAOS does not reimburse for meals/beverages taken in lieu of AAOS-provided or sponsored meals, or for meals/beverages after travel has concluded (i.e., after return flight). If covering expenses for another NOLC attendee, you must write the attendee name(s) on the receipt. Spouse/guest expenses are not reimbursable.

11 Other Travel Expenses
AAOS will reimburse individuals for usual and customary miscellaneous expenses related to travel in conjunction with AAOS business. Allowable expenses in this category include:

- Wi-Fi usage on flights
- Internet usage based on hotel’s access charge and reasonable cost (See Exhibit A)
- Hotel in-room movie or use of hotel fitness center
- Customary gratuities for baggage handling, etc.
- Ground transportation to and from airports
- Valet laundry service up to $50 when travel covers seven consecutive days.

The AAOS master account at the JW Marriott Hotel only will cover room and tax. Any incidental expenses are to be paid by the traveler and claimed on the expense voucher, if appropriate.

Personal expenses are not reimbursable. Examples include, but are not limited to, child care, pet care, entertainment, and toiletry purchases.

12 Special Rules Regarding Travel
Add-on personal travel

Add-on or personal travel is defined as travel either before or after the NOLC that is scheduled at the sole discretion of the traveler. All expenses incurred with add-on travel are the responsibility of the traveler.

If you elect to attend the Media Training session on Wednesday, June 5, 2019, and need to arrive Tuesday, June 4, you are responsible for any additional hotel nights and other costs.

Expense reporting/receipts

Receipts are required for each travel expense item that is $25 or more, including taxi fares; however, the traveler strongly is encouraged to obtain receipts for all expenses. As
required under IRS guidelines, receipts for meals/beverages should be detailed showing individual food and/or beverage items. Hotel receipts should include detailed room folios. Expense reports (with attached receipts documenting all costs of $25 or more) are due to the AAOS within 30 days of the completed travel date. This ensures timely reimbursement and accurate record keeping. Reimbursement checks typically are issued within two weeks of receipt of vouchers.

Reimbursement requests exceeding $25 without receipts will be reimbursed at $25.

**Exhibit A**

**Internet access procedures when traveling**

Travelers will be reimbursed for Internet use for AAOS business or AAOS-related research. Some computer systems do not support all methods of Internet connection.

**Internet access**

In order to be reimbursed for Internet connectivity, the traveler must utilize one of the following:

- The hotel's local Internet service provider to access the Internet at the hotel's stated per diem rate. It is the responsibility of the hotel guest to obtain this information and specifics regarding log-on and/or passwords upon check-in, or

- His/her own Internet service provider if that provider has a local access number or toll-free access for the area where the individual is traveling. *It is the responsibility of the individual to ensure that this option is a viable alternative prior to traveling.*

Most national Internet service providers (ISPs) have areas on their websites where local access or toll-free access numbers can be found. Please note that when using the service provider's toll-free access number in lieu of a local access number, a surcharge or per-minute charge is typically added to the subscriber's monthly bill. This will be the subscriber's responsibility to pay and is not reimbursable.

Many national ISPs also have a customer service number to call for the local access number for a given travel destination. Small providers may not have a national access network. The traveler should contact his/her individual service provider for more details.
13 Right to Modify Policy

The American Academy of Orthopaedic Surgeons reserves the right to modify this Travel Policy for National Orthopaedic Leadership Conference (NOLC) at any time. Changes and modifications will be effective when approved and posted.
Follow the conversation on twitter and participate while you are on the Hill!

@AAOSAdvocacy #NOLC2019

Thank your member of Congress and staff for their time and support. If possible, post a photo (with your group and/or the Member, outside the office, in front of the building, etc.), and we will retweet it!

Don’t have twitter? Email photos and updates to dc@aaos.org and we will post for you!

@AAOSAdvocacy #NOLC2019

- Example: Thanks to @RepJimBanks for supporting Indiana surgeons on important advocacy issues. @AAOSAdvocacy #NOLC2019

- Example: Great meeting with @RepJimBanks talking about ways to increase hospital competition and patient choice! @AAOSAdvocacy #NOLC2019

- Example: Increased hospital competition will lower costs and increase both access to and the quality of care. Great meeting with @RepJimBanks office for @AAOSAdvocacy #NOLC2019!
Washington Office Events

We invite you to join us for the following events at the AAOS Washington Office

⇒⇒ 317 Massachusetts Avenue, NE, 202-546-4430 ⇔⇔

Open House

Stop by where you will have access to wireless internet and enjoy a cold beverage and light refreshments in between Capitol Hill visits.

Thursday, June 6
9:00AM – 3:00PM

Wine and Cheese Reception

Help celebrate another successful NOLC at this reception with an assortment of wine and cheese.

Friday, June 7
5:30PM – 7:00PM

Hill Day Transportation

Transportation will be provided on Thursday, June 6 from 7:30AM – 3:30PM

⇒⇒ Vans will be on E Street, between 13th & 14th Streets ⇔⇔
Exit the hotel through the glass doors on Level P.

Transportation to the following locations will loop throughout the day every hour, on the ½ hour:

JW Marriott Hotel
1331 Pennsylvania Ave, NW

Garfield Circle
Intersection of Maryland Ave. and 1st St., SW, adjacent to Reflecting Pool

AAOS Washington Office
317 Massachusetts Avenue, NE
FUTURE AAOS MEETINGS
2019-2022

Annual Meeting

• March 24-28, 2020 – Orlando, FL
• March 9-13, 2021 – San Diego, CA
• March 22-26, 2022 – Chicago, IL

National Orthopaedic Leadership Conference (NOLC)

• June 5-8, 2019 – Washington, DC
• June 3-6, 2020 – Washington, DC
• June 2-5, 2021 – Washington, DC

Fall Meeting

• October 24-26, 2019 – Nashville, TN

Note: The AAOS Travel Policy only applies to the AAOS Annual Meeting. The AAOS NOLC and the AAOS Fall Meeting have separate travel policies.
Orthopaedic Calendar

A comprehensive calendar of orthopaedic events is available on the AAOS home page [www.aaos.org](http://www.aaos.org) located in the middle of the page. The calendar is easy to use, searchable and updated on a continual basis to provide the most accurate information on meetings, courses and events.

The direct link to the calendar is [www.aaos.org/calendar](http://www.aaos.org/calendar)

**What is listed:** This calendar lists AAOS meetings, courses, and other events, orthopaedic specialty society meetings and courses, meetings of international orthopaedic societies, and courses that have been developed and will be presented by international societies.

**What is not listed:** Events presented by the orthopaedic industry are not listed on this calendar. Nor are courses and events developed and/or presented by individuals or third parties.

**How to list qualified courses and events:** AAOS events (committee meetings, courses, workshops, council meetings, etc) are handled internally by Academy staff. If your non-AAOS meeting, event, or course matches the criteria for listing above, please contact the appropriate individual:

- International society meetings and events: Lisa Murphy (murphy@aaos.org)
- Regional orthopaedic society meetings and events: Yasseline Martinez (ymartinez@aaos.org)
- Orthopaedic specialty society meetings, events, and courses: Liz Frale (frale@aaos.org)
- State orthopaedic society meetings, events, and courses: Yasseline Martinez (ymartinez@aaos.org)

Please send comments regarding the calendar to calendar@aaos.org