



# 2017-2018 Annual Report



# 2017-2018 AAPL Annual Report

## Table of Contents

AAPL Mission Statement.....	2
2017-2018 AAPL Board of Directors .....	2
About AAPL .....	2
Highlights of 2017 .....	2
Highlights of 2018 .....	3
Thank You to our Supporters .....	3
Upcoming Events .....	3
President’s Report.....	4
Committee Reports.....	5
Communications Committee .....	5
Program Planning Committee.....	5
Membership Committee.....	6
Mentoring Committee .....	7
Nominating Committee .....	7
Webinar Committee .....	7
Executive Director’s Report .....	8
Treasurer’s Report .....	10

## AAPL Mission Statement

The American Association of Physician Liaisons exists to advance the art of physician and healthcare provider relationships through the provision of educational programming, professional development, shared resources and networking opportunities.

## 2017-2018 AAPL Board of Directors

Thank you to the following AAPL members who served on the 2017-2018 AAPL Board of Directors. Your dedication and hard work made the successes of the past year possible.

<b>PRESIDENT</b>	Gail Chellis	<b>BOARD MEMBERS AT LARGE</b>	Vivian Highton*
<b>PRESIDENT-ELECT</b>	Tom Anderson		Jeremy Holt
<b>PAST-PRESIDENT</b>	James Finnen		Amy Lynch
<b>TREASURER</b>	Stephanie Niemi		Sara Miller
<b>SECRETARY</b>	Paula Murphy		Robbie Reed
<b>HISTORIAN</b>	Carla Alexander		

\*served through December 2017

## About AAPL

The American Association of Physician Liaisons is the only professional network that is powered by and developed for physician liaisons. The purpose of AAPL is to bring together those actively engaged in physician liaison activities in acute care medical centers for educational and networking opportunities. AAPL consists of a geographically diverse group of healthcare professionals who are interested in establishing professional relationships with their peers from around the country. AAPL sponsors an annual educational conference that offers exciting, expert speakers who present information on subjects of relevant interest, aimed at improving the skills and capabilities of the Physician Liaison.

AAPL has grown to almost 600 members nationally who work as:

- Physician Liaisons
- Vice Presidents
- Hospital Sales and Marketing Team Members
- Business Development Liaisons
- Directors of Business Development
- Directors of Referral Development
- Business Development Managers

## Highlights of 2017

- [2017 Needs Assessment](#) was conducted
- AAPL Resource Library was enriched with the addition of Sample Job Descriptions and Sample Onboarding Checklists
- [AAPL Membership Fact Sheet](#) was created for recruitment of new members
- Successful 2017 Annual Conference *Castig a Wide Net* took place in Naples, Florida with 248 attendees
- 15 Mentor/Mentee pairs were matched through the AAPL Mentoring Program
- 2 AAPL Regional Meetings: Austin, Texas (67 attendees) and Chicago, Illinois (51 attendees)
- 9 Webinars were offered with a total of 520 participants
- AAPL Instagram launched for a total of 4 AAPL Social Media channels
- [Physician Relations Insights – A SHSMD Benchmarking Study](#) was published in conjunction with The Society for Healthcare Strategy and Market Development (SHSMD)

## Highlights of 2018

- Successful 2018 Annual Conference *Capital Ideas for Growth* took place in National Harbor, Maryland with 265 attendees
- Resource development surveys were developed by the Executive Director and AAPL member volunteers who expressed interest on the 2017 Needs Assessment
- Strategic Planning SOAR goals were created, with implementation to take place in 2018
- President-Elect, Treasurer, and 4 Directors-at-Large were welcomed to the 2018-2019 AAPL Board. A new call for board nominations will take place in April 2019.

## Thank You to our Supporters

With gratitude, AAPL thanks their sponsors and supporters:



## Upcoming Events

AAPL will continue to offer its members multiple meetings throughout the year in order to best serve members' needs. Please mark your calendars for these upcoming events around the country. We hope you will join us!

### **September 13, 2018**

AAPL Regional Meeting  
Portland, Oregon

### **November 7, 2018**

AAPL Regional Meeting  
Worcester, Massachusetts

### **June 26 - 28, 2019**

2019 AAPL Annual Conference  
Grand America Hotel  
Salt Lake City, Utah

## President's Report

Gail Chellis [gchellis@hotmail.com](mailto:gchellis@hotmail.com)

I want to thank each of you for being an active and engaged member of our wonderful organization, the *American Association of Physician Liaisons*. Over the past year during my presidency, your interest and input regarding AAPL's goals and vision were appreciated as we moved the organization forward. AAPL is here for you and cannot be successful without your dedication and hard work to constantly improve the skills and capabilities of physician liaisons around the country.

This past year, AAPL made a committed effort to solicit the involvement of members in many of our organizational decisions through our 2017 Needs Assessment. Upon synthesis and analysis of the results, we took action based on your responses such as:

- commitment to a more robust presence in the social media arena
- periodic surveys of membership
- enrichment of AAPL Resource Library
- augmented membership touchpoints such as the weekly e-updates
- update and revision of AAPL's strategic goals
- two successful regional meetings: Austin, Texas and Chicago, Illinois
- nine webinars with record-breaking participation

All of this was done with mindful stewardship of our organization's treasury.

We have had continued success with our regional meetings and have already planned two one-day sessions for Fall 2018 in Portland, Oregon and Boston, Massachusetts. It is our hope that these educational "retreats" and webinars bring valuable education to our members where they are, as we understand it is not always feasible to travel to the AAPL Annual Conference.

Also, this past year we launched a resource library for our members. We kicked this off by garnering information from surveys of our experts – YOU! We now have 6 members-only webpages in the AAPL Resource Library that members can access. This process will continue with final products posted on the members-only section of the website.

A final thanks goes out to our AAPL Board of Directors. These achievements were produced through their dedication to AAPL and their commitment to gauge our actions against AAPL's goals while maintaining due diligence toward AAPL's finances. It was an honor to serve as AAPL's President and I wish all of you continued success in your role as a physician liaison.

## Committee Reports

### Communications Committee

Carla Alexander [carla@uams.edu](mailto:carla@uams.edu)

Jeremy Holt [jholt3@srhs.com](mailto:jholt3@srhs.com)

AAPL currently engages in 4 social media platforms:



**LinkedIn:** [American Association of Physician Liaisons](#)

- 2,046 Members
- Network with colleagues, share best practices
- Special thanks to our weekly moderators: Jennifer Burnley and James Finnen



**Facebook:** [@AAPLinc](#)

- 779 likes
- Share Annual Conference photos and social networking photos



**Twitter:** [@DrLiaison](#)

- 236 followers
- Live tweeting during the Annual Conference



**Instagram:** [aapl\\_network \(aapl\\_network\)](#)

- 25 followers
- Great way to connect with other members and share photos from the field
- #aapl2018 for Annual Conference posts

### Program Planning Committee

Tom Anderson [tanderson0@bwh.harvard.edu](mailto:tanderson0@bwh.harvard.edu)

Sara Miller [millersa@slhs.org](mailto:millersa@slhs.org)

#### A. Area of responsibility:

- Analyze membership needs assessment and post-event surveys to identify key educational topics and speakers
- Produce events which provide networking opportunities and deliver relevant and timely education to members
- Each year host a minimum of two regional conferences and one annual conference for our members
- Lead 1-2 Program Committee meetings each month to assist with planning efforts for all educational events

#### B. Specific goals set at start of year:

- Successfully host two regional meetings and one annual conference
- Engage committee members and general membership by providing volunteer opportunities including regional meeting hosts, speaking engagements and opportunities to plan membership events
- Solidify reservations for 2019 annual conference

#### C. Progress report on the goals:

- February 21, 2017 – Regional meeting, Austin, Texas – 67 attendees
- November 9, 2017 - Regional meeting, Chicago, Illinois – 51 attendees
- June 14-16, 2018 – Annual Conference, National Harbor, Maryland - 260 attendees

#### D. Budget or financial issues: AAPL develops a comprehensive budget for all educational events.

E. Thank you to our committee members:

Sara Miller	Tom Anderson	Barbara Hamschin
Beth Kassalen	Chris Ford	Christina Sarge
Corrin McCloskey	Cynthia Anderson	Debi Morris
Maria Ramos-Person	Willa Lyon	Michelle Jones
Denise LaGrange	Edlyn Fernandez	Erin Plocinski
Felicia Manganiello	Holly Aldridge	Jenny Hansbrough
Jill Coyle	Jill Folden	Joyce Bahori
Kerry Nisco	Tracie King	

F. Future goals:

- Increase membership participation
- Identify members who can continue to host regional events at locations we have already visited. Might be good to establish an annual event in regions where we have strong attendance.
- Identify topics by September 2019 and publish “call for speakers” to members and potential sponsors
- Two extended days vs. two and half days

## Membership Committee

Stephanie Niemi [Niemis@mlhs.org](mailto:Niemis@mlhs.org)

Amy Lynch [Amy-Lynch@smh.com](mailto:Amy-Lynch@smh.com)

A. Area of responsibility:

- Hold monthly meetings
- Engage committee members to inspire ideas to increase the brand awareness of AAPL
- Increase new members and increase the retention of current members

B. Specific goals set at start of year:

- Invite more members to participate on committee
- Increase AAPL Membership to over 600 and increase retention of current members
- Implement a more reliable tracking system to enhance our recruitment efforts and track our progress
- Utilize different tactics for recruitment other than calling lapsed members from the list
- Personal calls to new AAPL members and welcome them to AAPL

C. Progress report on the goals:

- Google sheets “database” was implemented that enables us to record our committee’s progress during the month based on lapsed/ new member reports from HQ. This tool has proven to still be cumbersome and not very helpful for our purposes.
- AAPL Member Fact Sheet and a recruitment postcard were created for mailing to targeted hospitals/ liaison programs and for use with member recruitment and retention
- Targeted outreach to physician liaison programs in states surrounding the annual meeting venue

D. Thank you to our committee members:

*Amy Lynch*, Senior Physician Liaison, Sarasota Memorial Health Care System

*Stephanie Niemi*, Senior Physician Liaison, Lankenau Medical Center | Main Line Health System

*Judy Schlott*, Partnership Liaison, Surgical Institute of Reading & Reading Surgery Center of SIR

*Karol Wilson*, Marketing and Outreach, Senior VCU Health System, Children’s Hospital of Richmond at VCU

*Rose Wheelus*, Community Outreach, Community Hospital of the Monterey Peninsula

E. Proposals for next year:

- Identify ways to access and share database information to improve planning and tracking
- Work collaboratively with other AAPL committees to add to greater goals

## Mentoring Committee

Paula Murphy [paula.murphy@bjc.org](mailto:paula.murphy@bjc.org)

For the past year the mentoring program has continued to connect newer liaisons with more seasoned professionals. From July 2017 – May 2018 there have been 15 mentor-mentee pair connections made. Consideration of geographic location, type of practice/hospital focus and outreach targets liaisons are matched.

The mentorship program asks for mentors to have been in a liaison role for at least 5 years, be active AAPL members and commit to connecting with the mentee at least quarterly. Most pairs connect much more than quarterly. This year, one such pair was featured in the weekly AAPL communication highlighting their relationship and the benefits that both the mentor and mentee felt were important.

A trend that is becoming apparent is the need for mentors that work in “stand-alone” practices, more specialized niche markets. Many of our “seasoned” AAPL members work in programs based in hospitals or healthcare systems, since those are the institutions that championed physician liaison programs. As AAPL membership reaches out to a wider audience, many newer AAPL members are coming from positions that are not based in a hospital or large health system. Many requests are coming from liaisons in surgery centers, ophthalmology practices, ENT, or fertility clinics. These practices recognize the value of a physician liaison and those liaisons are looking for mentors.

A simple way to increase your participation in AAPL would be to consider serving as a mentor. It is a great way to advance the profession, share your experience and knowledge, and meet a new person.

### Future Goals:

- Recruit mentors from independent, stand-alone facilities to handle increasing membership
- Highlight availability of this AAPL Membership benefit throughout the year

## Nominating Committee

James Finnen [james.finnen@bswhealth.org](mailto:james.finnen@bswhealth.org)

Committee members: James Finnen, Jeremy Holt, and Tara Lowe

- A. Six positions were open for the Board in 2018:
  - a. President-Elect (3-year cycle)
  - b. Treasurer (2-year term)
  - c. Four Directors-At-Large (2-year term)
- B. March: Call for Nominations took place  
April: Vetting of Candidates took place  
April/May: Voting by Membership took place  
June: Newly elected members assumed office

## Webinar Committee

Robbie Reed [Robbie.reed@aol.com](mailto:Robbie.reed@aol.com)

Alexandra Curiale [ACuriale@ghvhs.org](mailto:ACuriale@ghvhs.org)

- A. Specific goals set at start of year:
  - 6 webinars plus 6 sponsor-related webinars
  - Increase committee participation
- B. Progress report on the goals:
  - 2 webinars have been identified and are in process planning; sponsor webinars are on-track
  - 4 webinars need to be identified after the conference based on membership suggestions

C. Thank you to our committee members:

Robbie Reed [robbie.reed@aol.com](mailto:robbie.reed@aol.com)

Alexandra Curiale [Acuriale@ormc.org](mailto:Acuriale@ormc.org)

Nancy Biaggi [nancy.biaggi@uchealth.org](mailto:nancy.biaggi@uchealth.org)

Shelly Moore [Shelly.Moore@mercy.com](mailto:Shelly.Moore@mercy.com)

Maria Ramos-Person [mperson@flcancer.com](mailto:mperson@flcancer.com)

Jennifer Burnley [jennifer.burnley@emoryhealthcare.org](mailto:jennifer.burnley@emoryhealthcare.org)

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## Executive Director's Report

Beth Kassalen, MBA [beth@kassalen.org](mailto:beth@kassalen.org)

I am honored to be working with the *American Association of Physician Liaisons* and serving as its Executive Director. I've seen substantial growth in the AAPL membership and meaningful development of the Board since 2012. AAPL is changing, just as the role of the physician liaison is changing.

As a professional association, AAPL must continually assess the environment to envision a future for itself and to determine the physician liaison's ever-changing role. This vision requires the Board to delve into strategy and planning and often takes a lot of time. A fundamental part of this planning is to figure out the best way to get things done: through volunteers or through paid staff. In its infancy, AAPL was managed solely by volunteers. These volunteers put much of their spare time into framing AAPL's mission and vision while also managing all the daily operational work. As AAPL experienced growth in membership, its Board realized that dedicated association management help was needed. Opportunities and growth were being hindered by the lack of time and ability that volunteers were able to dedicate toward AAPL and in 2012, AAPL hired a management company to handle the operational, conference and financial activities.

Between 2012 and 2017, the Board was able to focus on strategy, content, and membership needs while the management company focused on operations. As the climate of healthcare began changing, physician liaisons found their roles changing as well. The AAPL Board began assessing future needs and determined that AAPL membership would benefit from the guidance and daily input of an Executive Director; I started in this role officially in June 2016. Having an Executive Director who could dedicate the time and skill every day to AAPL fosters a sense of continuity and helps propel long-term projects through to completion.

The role of Executive Director is to support every person in AAPL: the Board, the committees, the membership, AAPL's sponsors and strategic partners. An integral part of my role as Executive Director is to assist with planning and strategy, and then follow-up through implementation and dissemination. I serve as that constant, moving projects forward and providing executive input to the Board. This also includes leading a call, developing a resource, and keeping everything continuing forward when an AAPL volunteer leader has a work or family conflict that understandably takes precedence over their AAPL volunteer duties.

A primary responsibility as Executive Director is fiscal management of AAPL. Effective financial oversight is achieved through close collaboration between the Executive Director, the Board, the Treasurer, the accountants, and Barbara Hamschin, AAPL's team leader at headquarters. Fiscal management includes developing an overall operational budget as well as creating budgets for each major sector of AAPL such as the annual conference, webinar series, marketing publications, and regional meetings. The annual operating budget for AAPL in 2018 is approximately \$280,000 and we manage with due diligence. Budgets are developed using historical data then reviewed, approved and most importantly, followed. Income is received through payments by check, credit card, or PayPal account and each monetary repository is reconciled at the end of every month. The Board is provided with monthly financial reports which are reviewed during every Board call.

Through the managerial changes, AAPL created opportunities for its members like adding regional meetings, offering the highest-quality educational webinars, expanding the scope of the term 'liaison' for membership purposes, offering our partners year-round engagement with our membership, and finding efficiencies to eliminate operational hurdles and roadblocks.

As Gail Chellis took the helm as President after a great tenure by James Finnen, Gail's presidential platform was to give the membership what they need and want from their professional association. To accomplish that goal, I developed a comprehensive needs assessment so that membership could easily and quickly communicate their needs and wants to AAPL leadership.

The needs assessment yielded 271 respondents and many pages of data and comments for the Board and me to digest during 4<sup>th</sup> Quarter of 2017. Most importantly, we posted the summary response on [www.PhysicianLiaison.com](http://www.PhysicianLiaison.com) in the Members' Only section for all members to review.

Our goal with every member survey is to reinforce that AAPL leadership takes member input and comments very seriously. We conduct these surveys so that we can provide solutions based on your requests and needs. The data has not, and will never, sit stagnant on a shelf or electronic file.

Requests for three specific member resources were apparent:

1. "We need to remind people what we do!"
2. "We need to inform our C-Suite about the value of our work!"
3. "We need to easily show physicians how we can help them achieve their goals"

Nineteen members responded that they would like to work on the final products resulting from the resource materials being created from the needs assessment. These AAPL members have been sent the results for several questions and are working with me to create some valuable materials for all the membership.

Much work surrounds planning for the Annual Conference, and I was especially excited to connect a Dale Carnegie Master Presenter with AAPL who provided three amazing and engaging talks at the Gaylord National Hotel in Maryland. I attended several lectures and breakout sessions during the 2 ½ -day conference and saw a plethora of new information, tips and best practices provided to our members. Best of all, I heard attendees expressing that 'they are speaking our language', 'I am learning so much', and 'that people here understand what I do day in and day out.' We had about 107 first-time attendees! Fully ⅓ of the audience was new to the AAPL Conference experience which means that an incredible ⅔ of attendees were returning year after year, realizing the value of the face-to-face networking opportunities and content exposure that the AAPL Annual Conference provides.

I worked with the Membership Committee to propel their ideas of outreach and recruitment, targeting physician liaison departments in the states surrounding Washington, DC. We designed postcards, mailed hard copy invitation letters, and followed up with electronic communications. We regularly reminded AAPL members about the valuable benefits afforded through their AAPL membership such as the Mentorship Program, Resource Library, free monthly webinars, regional meetings, online Membership Directory, and more.

In summary, my goal as Executive Director is to make sure that AAPL, its Board, its volunteer leaders, and its members achieve their goals. I work to ensure that AAPL provides our members with the resources that elevate their expertise in their field, and to increase the visibility of the liaison role as well as all of the exceptional, multifaceted data and information that liaisons provide their C-Suite and institutional leaders.

# Treasurer's Report

Stephanie Niemi [niemis@mlhs.org](mailto:niemis@mlhs.org)

## Financial Operations at AAPL

- AAPL's financial records are professionally managed by accountants at our management company
- All bank accounts and credit card transactions are reconciled at the end of each month
- The Board is provided with monthly financial reports including:
  1. Balance Sheet
  2. Profit and Loss Statement
  3. Actual vs. Budget
  4. Profit and Loss Detail (every transaction occurring)

## Taxes

- AAPL is classified as a non-profit 501(c)6 corporation under the IRS code
- AAPL was incorporated in the State of Tennessee
- Each year, an independent Certified Tax Accountant reviews our financial accounts
- AAPL files a tax form in the State of Tennessee annually
- AAPL files a Federal Form 990 annually

## Budget and Planning

- The AAPL Treasurer, management company and Board use historical data and planned initiatives to develop a budget for the upcoming year.
- The operational budget for 2018 is **\$279,432**.
- A separate project budget is developed for each educational event, such as the annual conference, regional meetings, and webinar series.

## Finances End of Year 2017

For transparency, the following EOY 2017 financial reports were provided on the Members Only section of the website:

1. Balance Sheet
2. Profit and Loss Statement
3. Actual vs. Budget

At the end of 2017, our Balance Sheet indicates the net worth of AAPL as **\$81,535**. That means money in our bank accounts and reserves, minus any outstanding liabilities. AAPL is in financial good health.

## Sources of Income

From the EOY 2017 Profit and Loss Statement, here are AAPL's top sources of income:

### Income

Annual Conference Registrations	<b>\$109,755</b>
Annual Conference Sponsors	<b>\$58,500</b>
Membership Dues	<b>\$71,935</b>
Regional Meeting Registrations	<b>\$6,025</b>

## Major Expenses

From the EOY 2017 Profit and Loss Statement, here are AAPL's top expenses:

### Expenses

Annual Conference	<b>\$124,201</b>
Association Management Company	<b>\$117,025</b>
Operations/Committees/Software	<b>\$6,405</b>
Credit Card Fees	<b>\$5,384</b>