

AOA Paraoptometric Section State Leaders Guidebook

Section One:

How to Start an Association

**GUIDEBOOK FOR ORGANIZING
A STATE OR LOCAL
PARAOPTOMETRIC ASSOCIATION**

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INTRODUCTION

This Paraoptometric Organizational Handbook is made available by the AOA Paraoptometric Section to aid in the development and establishment of state and local paraoptometric associations throughout the country. It may also provide existing associations with ideas for expanding their activities.

Contained within this guidebook are sample letters, forms, and other materials created by existing paraoptometric associations that have helped them to succeed. The information provided in this guidebook represents common guidelines that many paraoptometric associations used when they started. Each newly-forming association must evaluate the information contained in this handbook and adapt it accordingly.

Each paraoptometric association will operate differently. By their very nature, for example, local associations will operate in a different manner than state associations. Local associations may meet more often because their members live in closer proximity to each other. State associations may meet less frequently, but may put together larger educational programs. Each association will conduct its business based on the interests, strengths, and commitment of its members.

The AOA Paraoptometric Section hopes that this guidebook will be useful as you attempt to organize a new association. It has been compiled by paraoptometricians from their experiences, and for use by paraoptometricians. The sharing of this information for the benefit of others is the essence of our potential for success as a profession.

It is most realistic to organize the paraoptometric personnel within each association's geographic boundaries, with a prerequisite state and society membership of the employing optometrist. Each paraoptometric association should operate independently with its own constitution and bylaws and under the direction of the state or parent association.

Naturally, each group will have elected officers, with the president holding a seat as an active voting member on the association's board of directors. In turn, the association president-elect serves as liaison to the paraoptometric association.

Paraoptometric personnel include, but are not limited to, opticians, vision therapists, office managers, Allied Health professionals, certified assistants and technicians. All paraoptometric personnel should always be encouraged to attend both educational and social meetings of the association, as well as their own meetings.

The question of dues arises. Being a nonprofit organization, a basis to cover operating expenses should be established. The specific amount can be covered in your bylaws. Certainly, we would like to encourage all dues be covered by a member's employer – but it may be covered by either the paraoptometrician or the employer.

Paraoptometricians deserve the best from optometry. Truly, our most valuable asset is the paraoptometrician functioning in the office, the community, and within the paraoptometric structure. It is to their advantage, as well as ours, to institute a formalized organizational structure, promoting continuing education, cohesiveness, and a strong pride in the profession.

KEY TERMS AND DEFINITIONS

WHO ARE PARAOPTOMETRICS?

Paraoptometrics are allied health personnel who assist optometrists in providing their highest level of vision care to patients. Front office procedures, chair-side assisting, pre-testing, contact lens instruction, frame styling and fitting, and vision therapy are just a few of the many duties paraoptometrics perform while working directly with an optometrist.

WHAT IS THE AOA PARAOPTOMETRIC SECTION?

The American Optometric Association Paraoptometric Section is the nation's largest organization serving the needs of optometric assistants and technicians. The purpose of the Paraoptometric Section is to offer continuing education opportunities, service recognition, professional development and promotion, and opportunities for its members to be involved with a national professional association. The Paraoptometric Section promotes a health-team concept in the delivery of optometric care and enhances the identity of both the optometrist and the paraoptometric.

WHO IS ELIGIBLE FOR MEMBERSHIP IN THE AOA PARAOPTOMETRIC SECTION?

Any ancillary, allied health personnel sponsored by an AOA member optometrist is eligible for membership in the AOA Paraoptometric Section. Members of the Paraoptometric Section are also associate members of the American Optometric Association, the national organization representing the optometric profession.

WHAT IS PARAOPTOMETRIC CERTIFICATION?

This program has been developed by a respected panel of American Optometric Association paraoptometrics and optometrists, created to educate and continue educating as the field of optometric assisting grows.

Modern optometry demands that paraoptometrics accept a key role in the practice. They must receive continuing education and training in order to fill this role. Paraoptometrics serve only to enhance the profession of optometry, as well as the individual practices that employ them. Education and recognition is, and always will be, integral to the success of all involved.

WHY BECOME CERTIFIED?

The Paraoptometric Certification Program can provide a formal declaration of education and skill achievement in the field of paraoptometry. Increasing your knowledge of paraoptometry will give you the opportunity to improve your job satisfaction and your working relationships with your doctor, your peers, and the patients you serve.

By becoming a certified paraoptometric, you obtain the skills to become a part of the clinical team. Optometrists respect the skills of a certified paraoptometric. Additionally, this program is inexpensive, and candidates can complete the program with minimal assistance from the optometrist.

STRATEGY TO GETTING STARTED

This section includes the fundamentals of organizing the first meeting of your association. It details the advance planning, organizing, and recruiting efforts that will aid in getting your new state association off to a good start. These strategies are not all-inclusive nor are they fool-proof. You will need to examine each one to determine if the particular strategy is appropriate for your needs.

Starting a new paraoptometric association requires a great deal of advance planning and organizing. The more planning and research you do before your first meeting, the greater the likelihood for success.

◆ ESTABLISH AN ORGANIZING COMMITTEE

Starting a new state or local association requires a great deal of legwork. You will need several people to keep things moving. In addition, a group that starts together is often the first group elected to office. In this way, your group will be familiar with the plans for the association, because they were involved from the inception or formation.

Recruit individuals from more than one practice. It will show more statewide or regional representation. Ideally, you should try to recruit several paraoptometric, with different levels of experience, training, and duties. This will also give the group more ideas.

◆ SELECT A TEMPORARY NAME FOR YOUR ASSOCIATION

You will need to adopt a temporary name for your association until your first or second meeting when a formal name should be adopted. By having a name, even if only temporary, your efforts to organize can be attached to a specific association. You should use this name in all correspondence (perhaps even have some letterhead developed). Start building your name recognition early.

◆ SECURE ADVISORS

It is very important to identify one or two ODs who are willing to serve as advisors or liaisons for your new association, especially in this start-up phase.

Since you will be contacting the state/local optometric association and various ophthalmic companies for support, the help of an OD often serves to strengthen your efforts.

These advisors also may provide you with assistance in planning and speaking at your initial meeting, encouraging colleagues to support your association, etc. They may also be willing to let you use their office for a temporary mailing address, use their office equipment (computers, mailing machines, etc.) for the purpose of getting your association started. A good advisor/liaison can help you in practically every area, so recruit them and ask for their expertise.

◆ INCREASE SUPPORT

When possible, it is usually best for your paraoptometric association to be affiliated with the optometric association in your area/state. This will give your new association instant credibility and may provide you with access to many of the state/local society's facilities.

Your first step in gathering this support is to write a letter to your state/local optometric association and request permission to submit a proposal or give a presentation. You may wish to have your letter signed or supported by your liaison OD and any other OD whose names may lend support to your efforts. (See Appendix A for sample letter.)

◆ PRESENT YOUR CONCEPT/PROPOSAL TO THE BOARD OF DIRECTORS

When contacted to present your idea to the Board of Directors, make sure you have thought about all aspects of how you expect your new association to operate. They may want to know how often you will meet, what subjects and how education will be provided, membership requirements and goals, anticipated dues since you are non-profit and would not use "income," etc. Of course, the final decisions on how your new association will run is up to its new members, but you should be prepared to give the Board your expectations of how the association will operate.

◆ CONTACT OPTOMETRIC "FRIENDS" FOR FINANCIAL SUPPORT

When starting any new association, expenses are often incurred without a method for the organizer to receive reimbursement. You may wish to solicit funding from the state/local optometric association, your sponsoring ODs, ophthalmic labs, suppliers, and other industry associates.

A short letter detailing your plans, along with a request for a donation, will help defer expenses to pay for envelopes, letterhead, postage, phone calls and other expenses. Once your association is organized, it will be able to generate revenue from the payment of dues and other income-producing projects. (See Appendix B for sample letter).

◆ WRITE A LETTER OF INTENT TO ALL ODs IN THE STATE/AREA

With the help of your advisor/liaison, draft a letter describing your intent to form a paraoptometric association. Include information about how you expect the association to operate, the type of functions and education you will organize, and any other pertinent data. Inform the doctor that this association will serve to enhance the capabilities of their staff and ask for any ideas that may assist your association in becoming successful. Close with a paragraph that tells the doctor you will soon be contacting their staff of the first meeting. (See Appendix C for sample letter.)

◆ SET DAY, DATE, AND TIME FOR YOUR INITIAL MEETING

After consulting with your state or local optometric association for their dates, select the best day, date, time and location for your initial meeting. You may wish to meet at the same time and place as the optometrists, but in a separate room.

In many instances, restaurants will offer you the use of a private meeting room on the condition that your association will eat dinner there as well. Your first meeting will probably include some type of social function featuring food and drink, so you should be able to locate a suitable room.

If you don't plan to include a social function, you may be able to find space at a local high school or college, public library, or at a service club or lodge. Your employer's office or a colleague's office may function well as a meeting place, provided there is sufficient space for interested members.

Be sure to give yourself plenty of time during this meeting to do all of the necessary explaining - you may want to start early, especially if you'll be having a social function.

◆ PLAN YOUR MEETING

A good first meeting requires a great deal of advance planning. The more you plan beforehand, the less surprises you'll have when the actual meeting arrives. Make a list of what needs to be discussed and when. Buy a copy of Robert's Rules of Order, Newly Revised and familiarize yourself with the do's and don'ts of a first meeting. You may wish to attend one or two meetings of the local optometric society to get an idea of how they function.

Be sure to inform the manager of the meeting place of any special needs you'll have, such as a microphone (usually a podium and microphone will suffice), the room arrangement (round tables of no more than eight or classroom style), overhead or slide projectors or computer equipment

◆ SEND NOTICE TO THE OPTOMETRIC PUBLICATION

Send a notice of your intent to meet, along with all of the important details, to the editor of the state or local optometric society. Be aware that some publications are prepared a month or two in advance, so be sure you reach them before their deadline. Also make certain that your name, address, telephone and fax number are included in your notice so people can contact you for more information.

◆ SEND A NOTICE/INVITATION TO ALL PARAOPTOMETRICS IN THE STATE/AREA

Using the addresses of the ODs in your state/area, send a letter or invitation to "The Staff of Dr. XXXX", inviting them to the initial meeting. A printed invitation works well here. Be sure to ask for an R.S.V.P. so that adjustments can be made to accommodate those who are expected to attend. (See Appendix D for sample letter.)

ADDITIONAL SUGGESTIONS FOR SUCCESS

1. Be as professional as possible. Although the initial tone of the meeting will be relaxed, everyone will expect you (and your committee) to be professional since they assume you are the acting leaders. Set a good example.
2. Plan, plan, plan while being flexible.
3. Involve your OD advisor/liaison as much as possible.
4. Don't be afraid to ask for anything - the worst you'll get is a "no" or a better idea.
5. Educate both doctors and paraoptometric that the purpose of an organized association is growth through education.
6. A new organization will need funding – contact the state/local optometric group or ophthalmic industry for support.

THE ALL-IMPORTANT INITIAL MEETING

Your first meeting is very important. All will go well if you build enthusiasm and excitement for the association. This will result in many paraoptometric joining and returning to scheduled meetings.

Suggestion: If possible, send all information to prospective attendees so they will have time to read and prepare questions or suggestions. At your first meeting, you should provide written recommendations regarding proper bylaws, officer's duties, meeting times, dues structure, etc. Remember that these are your suggestions and your new members should have an opportunity to modify and/or accept each item in the proposal.

Encourage members of the new association to openly express their views on how they would like to see the association operate. They will appreciate and expect that you are willing to listen to their ideas. Although you may be instrumental in forming it, remember that this will be everyone's association and each member must have a say in how it will operate if you hope to keep them involved.

At the first meeting, you should have a written agenda and samples of any material that you want distributed.

Here are some strategies that you may wish to implement in order to get your initial meeting off to a great start. Feel free to use or modify any ideas that you think are appropriate to your particular situation.

◆ SCHEDULE AN ICE-BREAKER

Your first meeting should include some type of social function that gives people an opportunity to mingle and get to know each other. It is important that the members of your new association become friends with each other; they'll be much more likely to attend future meetings if they know and like the others who will be attending.

You may want to schedule a light dinner or a social hour immediately preceding the meeting. Your organizing committee should greet each attendee and make sure they are introduced to others. Don't let anyone sit alone. If you see that happening, bring someone over to that person, make the introductions, then excuse yourself, leaving the two people talking to each other.

◆ INVITE YOUR ADVISOR/LIAISON AND OTHERS TO ATTEND

Be certain that those who have been influential in helping your association evolve are invited and recognized at your first meeting. You may also want to invite the president of the local/state optometric society and auxiliary to join you at this first meeting. This will give you the chance to show these leaders that your association will be well-organized. The presence of the leaders will show your new members that your association has the backing and support of the local/state optometric society.

◆ PROVIDE NAME TAGS FOR EACH ATTENDEE

Make certain that each individual wears a name tag for easy identification. You should provide these at the door. This will help people to meet and greet each other (it will also help you if you are responsible for introducing people to each other).

◆ INTRODUCE KEY PEOPLE AND THOSE WHO ARE RECOGNIZED TO SPEAK

At the beginning of your meeting, introduce key people and honored guests. Then, as you proceed through the first meeting, ask each person to identify himself when rising to speak. This will help everyone learn each other's names.

◆ DISTRIBUTE AN INFORMATION-GATHERING SURVEY

An information-gathering survey will give you and your committee(s) important information on what to recommend for the association. It should request the name, address and phone number from each person in attendance, as well as information about suggested speakers and lecture topics, when and where to meet, and any other ideas they may have. (See Appendix E for a sample survey.)

◆ APPOINT ACTING OFFICERS OF YOUR ASSOCIATION

You will need to elect acting officers who will be responsible for following up on any suggestions made during the meeting. You will probably need at least four officers to start (President, Vice President, Secretary, Treasurer). They will be responsible for making the recommendations of when and where to meet, the dues structure,

Constitution and Bylaws, membership requirements, etc. The association will usually hold formal elections at its next meeting, normally when the Constitution and Bylaws are adopted.

In most cases, your organizing committee will be appointed by the membership to serve as acting officers. (See enclosures for sample Bylaws which include the duties of your officers.)

◆ **HOLD AN OPEN FORUM TO DISCUSS WHEN, WHERE, HOW, AND WHY TO MEET**

Take some of the agenda time in the meeting to open the floor for general discussion on when, where, how, and which educational topics they are most interested in for future meetings. This will serve two purposes. It will give your new officers a chance to get a general feeling of what the membership is looking for and it will give you the chance to see and hear your next generation of leadership. You will probably find that only several people will express their views. These "more-visible" people often will accept appointments to various committees to help conduct the work of the new association.

◆ **SET A TIME AND LOCATION FOR THE NEXT MEETING**

Establish a date, time, and location for your next meeting. If there is indecision over the one date, select two or three possible dates and tell the group that you will be reviewing their surveys to determine the most convenient time to meet. After selecting the date of the meeting, you should then mail notices two or three weeks prior to the meeting to all interested individuals. (See Appendix F for sample letter.)

THINGS TO DO ONCE YOUR ASSOCIATION IS UP AND RUNNING

1. Follow-up with a letter to all ODs and paraoptometrics letting them know the outcome of the first meeting. Include the names and phone numbers of the new officers and the date and location of the next meeting.
2. Establish a good rapport with representatives in the optical industry for future assistance in promoting the association, its programs, and providing supplies and equipment.
3. Establish a speaker's list of local doctors, paraoptometrics, and optical suppliers who are willing to present educational programs.
4. Inform members of upcoming education programs and of special interest articles in current ophthalmic magazines. You might want to look at some office management seminars also.
5. Maintain good communication between the ODs, paraoptometrics, and liaisons.
6. Periodically combine programs with the OD.
7. Provide information on your group to the state and national optometric and paraoptometric groups.
8. Contact the AOA Paraoptometric Section for a list of names of paraoptometric leaders in neighboring states.
9. Appoint a representative from your organization to attend the AOA Congress to meet and share ideas with other paraoptometric leaders.

MAINTAINING MEMBERSHIP: The Importance of Retaining Current Members

Working in the optometric profession is an exciting and challenging career. Unfortunately, not everyone stays in the field their entire working career. Many individuals work for optometrists for only a few years before moving on to another job in another field.

This represents a challenge for the new paraoptometric association to constantly maintain a steady or growing membership when involved in a career that features a high level of turnover. As a result, much of your effort will focus on recruiting new members while retaining your current ones.

Your association will probably appoint a Membership Committee to be responsible for recruiting new members. The following strategies may offer some useful ideas.

STRATEGIES FOR MEMBERSHIP RECRUITMENT

◆ CREATE A MEMBERSHIP APPLICATION

One of the first things your new association will need in order to recruit new members is a membership application. This form should request all the information you will need to determine whether the individual meets the membership requirements. The form should have space for prospective members to list committees to which they would like to be appointed, any hobbies or skills that might be useful to the association, i.e. calligraphy for signs, experience in setting up screenings, etc. (See Appendix G for a sample membership application.)

◆ DEVELOP A CERTIFICATE OF MEMBERSHIP

Each member of your new association should be given a certificate of membership printed on a good-quality paper, suitable for framing. (See Appendix H for a sample membership certificate.) All members should be encouraged to frame their certificates and hang them in their doctor's office. This allows your members a chance to let others know they are involved in their profession. It also serves to attract the attention of new employees who can then be asked to attend the next meeting.

The certificate should be mailed out shortly after approving the individual as a new member. Include with the certificate a welcome letter that re-states the benefits of membership in the association. (See Appendix I for sample letter.) If possible, you may wish to present the certificate to the individual at the next meeting. This gives the rest of your members a chance to meet the new members and will help give the new members some recognition in the association.

◆ SPONSOR A RECRUITMENT CONTEST

A contest can often encourage your members to recruit new individuals for the association. If possible, you may be able to get a local lab or supplier to give a cash award or other prize to the winner. Your contest can be set up on an annual basis or can run for a specified period of time (during your big recruitment push).

◆ SEND A NOTICE OF YOUR MEETING TO ALL MEMBERS ON A REGULAR BASIS

The best way to keep your members coming to the meetings is to keep them informed and interested. You can do this by sending out a "reminder" on a regular basis by a letter format or with a simple postcard listing the time, date, and location of your next meeting. (See Appendix J for sample letter.) Also, suggest they bring new employees. This is particularly important if your meeting location changes periodically.

◆ SEND A GENERAL MAILING TO ALL O.D. OFFICES ONCE OR TWICE A YEAR

Send a general announcement of your group and its upcoming program(s) to all ODs in your area/state once or twice a year. Because of the large amount of turnover in personnel, a mailing once or twice a year will reach many new people. In addition, it may lure those who have been around a long time but have not yet joined your association. (See Appendix K for sample letter.)

To conduct your mailing, obtain a list of all ODs and their addresses. You may obtain this from the state or local optometric association in your area. Before mailing the announcement, delete the addresses of the ODs where you already have members. This will eliminate spending funds to mail a "recruitment" letter to offices where you already have members.

TIPS FOR SUCCESS

1. When possible, mail information to the member's home address. People have a tendency to change jobs (or office locations) more often than they change their home address. In addition, if the person does move, it will be easier for you to get a forwarding address or find out if they have left the profession. This will help your Membership Committee keep their records up-to-date.
2. Make it clear that the membership belongs to the individual, not to the employer, regardless of who pays the dues. If, for example, a member goes to work for a different optometric office, the previous doctor cannot cancel that person's membership by asking for a refund of dues or transfer of membership to new employee.
3. Maintain your records carefully and faithfully. Accidentally billing (or not billing) someone for dues can create a financial nightmare for your group and result in lost membership.
4. Follow-up on any individual expressing interest in joining. Organize a few people who will be responsible for introducing the new (or potential) member to the others. Do this on an individual basis, not to the whole group. You don't want to embarrass a prospective member.

ARRANGING YOUR PROGRAMS

Perhaps the most important and tangible benefit that your association will provide for its members is that of organizing educational sessions. These sessions can take place at your regularly scheduled meetings or at Conference special events, such as your annual meeting or an annual Paraoptometric Education (often held at the same time as the optometrist's annual state/local meeting.)

Additional Information is available in the Meeting Planner at the end of this guidebook.

Highlights

There are seven major factors to consider when organizing your education:

◆ DECIDE ON TOPICS/SPEAKERS TO BE PRESENTED

One of your initial duties will be to determine the topic and speaker for each lecture. You will also need to determine how many lectures should be presented. For a general membership meeting, you will need only one lecture and topic, but for a larger two-day conference you may arrange for as much as 16 hours of education.

When planning your lectures, try to take into consideration the education and experience of your members. You will want to present a variety of education in order to maintain the interest of all. (See Appendix L for a sample list of possible lecture topics.)

◆ ARRANGE MEETING SPACE

After deciding the number of lectures to be presented, you will need to arrange for meeting space to hold the lecture. In most cases, this will not present a problem for a single lecturer at your regular meeting. You will, however, need to make certain there is ample space if you will be scheduling several lecturers over a two-day period.

Contact the hotel or conference center (or the meeting planner of the state/local optometric association) for assistance.

◆ CONTACT AND CONTRACT YOUR LECTURERS

Many associations have difficulty locating speakers but it doesn't have to be that way for your group, especially if you're willing to consider local talent. Many ODs, MDs and paraoptometrics will be quite willing, even flattered, to speak to your association. All you need to do is ask. Some ophthalmic laboratories have educational consultants whose function it is to provide education for their customers. Find someone who is not going to give a "sales pitch" for their product.

When asking, you should ask the individual if he or she would be willing to prepare and deliver a lecture on topic_____. That will give those who don't often lecture an idea of what to develop. Those lecturers with more experience may ask if they may give a similar lecture that they have already prepared.

It is usually best to have the lecturer sign some type of document stating he or she will give the lecture on a specified date, even if the lecturer is donating their services. The speaker is less likely to cancel the lecture if he or she has agreed in writing to present it. (See Appendix M for sample contract.)

As part of AOAPS membership access to the Speakers' Bureau may assist in finding speakers for your meeting.

◆ NEGOTIATE REIMBURSEMENT FOR YOUR LECTURERS

Many lecturers, especially industry representatives, will agree to donate their services to your association if you request it. Many groups say something like, "We have a small budget and can afford to pay \$XX dollars."

If you are holding a meeting in conjunction with a state/local optometric association, ask to obtain the list of speakers who will be speaking to the ODs.

◆ DEVELOP REGISTRATION PROCEDURES

In order to keep track of those who will be attending (and how many chairs and tables to set up for the lectures), you will need to develop a method to receive and tally registrations (who is going to which lecture). Your state/local optometric association may be willing to handle the registrations for you.

One registration method, which can be done by hand or on a computer, is to create a separate file (or sheet of paper) for each lecturer as well as a master registration list. Each registration should include the individual's name and the lectures he or she is planning to attend. Then simply write the person's name in each file (or on each sheet) corresponding to the correct lecture.

◆ ARRANGE LECTURE ROOMS

Regardless of whether you are scheduling eight lectures or one, it is imperative that the lecture room(s) be arranged to the satisfaction of the speaker. You should know in advance (from the contract) what the speaker needs to conduct his or her lecture. Most will require one or two slide or overhead projectors, a screen or a PC. They may also need a microphone and/or podium. You will be responsible for giving this information to the hotel/meeting room manager in advance of the lecture. It is also a good idea to check the room(s) just prior to the lecture for any final changes.

◆ PREPARE CONTINUING EDUCATION VERIFICATION FORMS

Most attendees will want some type of proof of attendance at the lecture. You will need to distribute some type of form to verify attendance. You can develop this form on your own or you can obtain forms (at a nominal fee) from the AOA Commission on Paraoptometric Certification . (See Appendix N for sample CE form.)

Continuing education (CE) credit is usually given on the basis of one hour for each hour of lecture in increments of 1/2 hour (no 1/4 hours awarded). Workshops are also awarded credit on an hour-for-hour basis. CE credit should not be granted to attendees who are absent for more than ten minutes of the lecture or workshop.

Many paraoptometrics use this education to meet the requirements for renewing their status with the Commission on Paraoptometric Certification.

You should assign a monitor for each lecture who will be responsible for admitting the course registrants, distributing any handouts, and signing the CE forms at the end of the lecture.

SERVICE PROJECTS FOR YOUR ASSOCIATION

There are many projects in which your new paraoptometric association can become involved. In addition to your efforts to educate your members, you may also want to participate in various community service projects that will educate the general public about the value of regular vision care. You may also want to involve members of your new association in several national projects.

Perhaps the most widely-known project is that of Save Your Vision Week, sponsored by the AOA. This national celebration, proclaimed each year by Congress, is held the first full week in March. Many state/local optometric associations, Auxiliary/AFVA groups, and paraoptometric associations conduct various community activities to bring attention to this event.

The AOA publishes a Save Your Vision Week planning guide each fall and it is available to all interested parties at no charge. The planning guide includes the theme of each year's Save Your Vision Week, sample promotional items, sample news releases, and ideas for projects. Call or write to the AOA for this planning guide each fall and begin planning your Save Your Vision Week activities early.

When appropriate you may wish to combine your talents with the local optometric association. The local association conducts many service projects throughout the year and would most likely enjoy co-sponsoring an event or two with your association.

Some associations even sponsor one or two of their members to attend a VOSH mission. VOSH, an acronym for Volunteer Optometric Service to Humanity, coordinates missions to provide eye care to various third-world countries. During a typical trip, several ODs and paraoptometrics travel to a poor area of a particular country, such as Guatemala, to provide eye care to the people. They also distribute used eyeglasses to those in need of vision correction. These trips are enormously gratifying to the individuals who attend. Your state optometric association may have information concerning upcoming trips.

Another area in which your association may become involved in community service is VISION USA. The mission of this organization is to assist those individuals whose income level prevents them from receiving assistance in obtaining anything more than basic vision care. To learn more about VISION USA, contact the AOA for further information.

ADDITIONAL ACTIVITIES OF INTEREST

Some associations publish a newsletter on a monthly, quarterly or some other regular basis. Although this project does require continuous work, it gives your members a very tangible benefit. Your newsletter can be a simple, four-page, typewritten sheet or it can be a fancy, typeset, printed piece with lots of graphics. Some office computers may have the capacity for your association to create an interesting newsletter at minimum expense.

The newsletter can contain information regarding upcoming programs, new members, or any other important data. Some newsletters include short articles or office tips, often written by members of the association or reprinted from another source (remember to get permission to reprint!). Still others include a placement service, providing space to area doctors to list any job opening that they may have.

Another activity in which your new association can participate is the National Paraoptometric of the Year Contest. For more information, contact the AOA Paraoptometric Section office.

MAINTAINING CONTACT WITH THE NATIONAL PARAOPTOMETRIC ASSOCIATION

The Paraoptometric Section of the American Optometric Association is the major national group representing paraoptometric. It conducts a variety of activities and all paraoptometric are encouraged to join the national association as well as their state/local association.

All state/local paraoptometric associations are encouraged to stay in frequent contact with the national organization. The AOA publishes a quarterly newsletter and often prints information on current happenings in the states.

In addition, you should keep the AOA Paraoptometric Section informed of the current officers of your new association, along with their addresses and phone numbers. This will allow the Section to distribute any relevant information to all associations in a timely manner, also this information, along with pictures, can be published in the CrossSection Newsletter.

Many of your members may already have been certified with the AOA Commission on Paraoptometric Certification.- You may want to encourage your new members to become certified as a way of demonstrating their skills and knowledge. Some paraoptometric associations form study groups to help their members prepare for the exams. The [CPO Study Guide](#) and [Self Study Course for Paraoptometric Assistants and Technicians](#) are available through the AOA Paraoptometric Section and are useful in preparing for the certification examinations. You may contact the CPC at SALderson@aoa.org for examination applications and handbooks.

The nationally recognized titles and certification levels for Paraoptometric are:

Certified Paraoptometric (CPO) – a person who has attained national recognition via certification by demonstrating an *understanding* of the concepts used in optometry. The CPO has demonstrated competence by a written examination.

Certified Paraoptometric Assistant (CPOA) – a person who has attained national recognition via certification by demonstrating the ability to *apply* the concepts used in optometric care. The CPOA has demonstrated competence by a written examination. May be on-the-job trained or a graduate of an AOA PS-approved assistant program.

Certified Paraoptometric Technician (CPOT) - a person who has attained national recognition via certification by demonstrating the ability to understand, apply and interrelate the concepts used in optometric care. The CPOT has demonstrated competence by a written and practical examination. May be on-the-job trained or a graduate of an AOA PS-approved technician program.

Many paraoptometric associations also sponsor at least one individual (usually an officer) from their association to attend paraoptometric functions at the annual AOA Optometry's Meeting®. The Paraoptometric Section usually schedules a variety of networking activities, education, Awards presentation for the Paraoptometric of the Year Award, Community Services and State Affiliate Membership Recruitment awards. Your representative may also attend the Section's annual business meetings and witness the election and installation of officers. The representative will also have the opportunity to get to know the officers of the AOA Paraoptometric Section Council. There is a State Leaders Business Meeting on Saturday at Optometry's Meeting®.

APPENDIX A

SAMPLE LETTER TO STATE/LOCAL OPTOMETRIC ASSOCIATION

Note: With permission, send on your employer's letterhead.

DATE

John Smith, O.D.
President
Mid-State Optometric Association
123 Main Street
Anywhere, US 01234

Dear Dr. Smith:

The Committee to Form the Mid-State Paraoptometric Association would like the opportunity to present a 15-minute proposal before the Mid-State Optometric Association Board of Directors at its next meeting. Our proposal will outline our plans to establish a Mid-State Paraoptometric Association to provide education, motivation, and service to the paraoptometrics and patients of the Mid-State area.

The primary objective of the association will be to sponsor continuing education for the paraoptometrics in the area. By sponsoring continuing education at our own meetings, or in conjunction with your association, the paraoptometrics in the area will improve and enhance their skills. This will allow us to be more effective in our efforts to help the area O.D.s provide the highest level of professional vision care.

A secondary goal of our association will be to sponsor various service/charity projects in the community to help increase the public's awareness and knowledge of the need for regular optometric care.

We would like to present the Mid-State Board of Directors with our tentative plans, which will outline the organization of our association, its goals, its revenue expectations and other considerations.

I will contact you later this week to discuss any details. Thank you.

Cordially,

Sandra Smith, CPOT
c/o Tom Johnson, O.D.
987 First St.
Anywhere, US 01234

APPENDIX B

SAMPLE LETTER TO INDUSTRY "FRIENDS" SEEKING SUPPORT

DATE

John Simpson
XYZ Ophthalmic Labs
567 Pine Ave.
Anywhere, US 01234

Dear Mr. Simpson:

We are in the process of trying to establish a formal paraoptometric association, to be known as the Mid-State Paraoptometric Association, to provide a forum for continuing education for paraoptometrics in the state/area.

One of the difficulties in starting a new association, of course, is that there are no dues dollars yet to offset our expenses. To help keep the costs from coming strictly from the pockets of the organizing committee members, we are seeking support from our friends in the ophthalmic community.

A small donation of \$50 or \$100 dollars would go a long way toward offsetting our costs for postage, envelopes, printing and other expenses. In return for your support, your name will be mentioned in the first newsletter of the association, as well as at our initial meeting. We are also interested in having a representative from XYZ Ophthalmic Labs present an education lecture at one of our future meetings.

Please make your donation payable to the Mid-State Paraoptometric Association in care of Sandy Smith, 987 First St., Anywhere, US 01234. Thank you for your consideration.

Cordially,

Sandra Smith, CPOT
c/o Tom Johnson, O.D.
987 First St.
Anywhere, US 01234

APPENDIX C

SAMPLE LETTER OF INTENT TO ALL O.D.s

DATE

Dear Doctor:

Would you like your staff members to improve their skills? Would you like them to learn new procedures and techniques? What if there was an association in your area that provided this? Would you support it?

The Committee to Form the Mid-State Paraoptometric Association is planning to host an organizational meeting some time next month (give specific time, date and place) for the purpose of establishing a paraoptometric association in the area. The major goal of the association will be to provide a forum for continuing education to improve the skills and abilities of our members. We will have lecturers at our meetings and would like to sponsor an education seminar in conjunction with the Mid-State Optometric Association.

Another goal of the association will be to conduct community projects to help inform the public about the need for continuing optometric care. We plan to do this by working with O.D.s in the state at various vision screenings, visiting schools and nursing homes, and other types of similar projects.

We are hoping that you will support our efforts to form this association. We will be contacting your staff with details concerning our first organizational meeting. We hope you will show your support by encouraging your staff members to attend.

In addition, if you have any specific ideas, advice, or encouragement you would like to share with us, please contact me at the address below. Our goal is to develop an important, viable, well-respected association of paraoptometrics who are working to help the O.D.s in the state provide the best vision care possible.

Please show your support by encouraging your staff to join our group.

Cordially,

Sandra Smith, CPOT
c/o Tom Johnson, O.D.
987 First St.
Anywhere, US 01234

APPENDIX D

SAMPLE LETTER OF INTENT TO ALL PARAOPTOMETRICS

DATE

Dear Paraoptometric:

These are exciting times in the vision care field and the excitement is growing over the plans to create a Mid-State Paraoptometric Association for the paraoptometrics in this state/area.

The goal of this new association is to plan and conduct various continuing education seminars for the paraoptometrics in the state/area, as well as promote the need for regular optometric care to our residents. The association will also provide an opportunity for paraoptometrics to establish professional relationships with their peers.

Please join us for our organizational meeting and give us your input as to how you would like to see the association operate.

DATE: Wednesday, October 1, 20XX
TIME: Cocktails - 6:00 p.m.
Meeting - 7:00 p.m.
LOCATION: Robinson's Restaurant (Private Room)
ADDRESS: 3579 Locust Street
Anywhere, US 01234

R.S.V.P.: Sandy Smith
c/o Tom Johnson, O.D.
987 First St.
Franklin, XX 01234
(444) 555-6666

At this meeting we will discuss possible bylaws for the association, membership requirements, a dues structure, and other matters as time permits. A copy of the bylaws is included. Please take time to review these before the meeting. We hope you'll become a part of the organization being created to serve you. Please join us.

Cordially,

Sandra Smith, CPOT
c/o Tom Johnson, O.D.
987 First St.
Anywhere, US 01234

APPENDIX F

SAMPLE "JOIN US AT OUR NEXT MEETING" LETTER

September 14, 20 _____

Dear Dr. and Staff:

The newly formed Mid-State Paraoptometric Association will be holding its next meeting on Wednesday, October 14, at the Mid-State Municipal Building at 7:00 p.m. Our featured speaker will be Dr. Tom Johnson, who will be presenting information on Dry Eye.

The purpose of the new Mid-State Paraoptometric Association is to improve the skills of our members. This will help us to provide our doctors with greater freedom to provide a higher level of vision care. We will accomplish our goal by hosting informational meetings at which various professionals will present information on their area of expertise. The meetings of the Mid-State Paraoptometric Association will be scheduled throughout the year. Our association is now officially recognized by the Mid-State Optometric Association and the State Optometric Association.

The annual dues for membership in the Association will be formally established at this meeting (we anticipate dues to be approximately \$20 per year). The meetings are held at 7:00 p.m. on the third Wednesday of every month at the Mid-State Municipal Building.

To get to the Mid-State Municipal Building, take Highway 16 west to Franklin Street, turn right (south) and go two blocks. The Municipal Building will be on your right. Parking is available in the back lot. Enter at the door to your right.

We encourage all paraoptometrics to attend the meeting, listen to a great speaker, make some new friends, and enjoy the evening. If you have any questions, please feel free to contact me at the phone number listed on this letterhead.

Cordially,

Sandra Smith, CPOT
c/o Tom Johnson, O.D.
987 First St.
Anywhere, US 01234

APPENDIX G

SAMPLE MEMBERSHIP APPLICATION

Name (Last) _____ (First) _____ (Middle) _____

Date _____ Certificate Designation _____

Homes Address _____

City, State Zip _____ Phone _____

Business Address _____

City, State, Zip _____ Phone _____

1. Name of O.D.(s)/Employer(s) _____

2. How long have you been employed as a paraoptometric? _____

3. How many hours per week do you work in an optometric office? _____

4. Please indicate the areas in which you work in the office (check all that apply):

Front Desk	_____	Contact Lenses	_____
Office Management	_____	Vision Therapy	_____
Frame Styling	_____	Low Vision	_____
Dispensing	_____	Laboratory	_____
Clinical testing (fields, tonometry, blood pressure)	_____		

5. Please indicate any topics/lecturers you would like presented at future meetings: _____

Please sign below to indicate that you and your employer have read the Bylaws of the Mid-State Paraoptometric Association and that you agree to abide by them as a member.

Your Signature

Sponsoring O.D.

For Office Use Only

Date Submitted _____

Membership Fee Billed _____

Date Approved _____

Membership Fee Paid _____

Certif. Mailed _____

Date of Renewal _____

Please return form to the Paraoptometric Section; 243 N. Lindbergh Blvd., Floor 1, St. Louis, MO 63141-7881

APPENDIX H

SAMPLE MEMBERSHIP CERTIFICATE

Certificate of Membership

This certifies that

Candace M. Wilson CPO

is a member in good standing of the

AOA Paraoptometric Section

for the year

2007



American Optometric
Association

Barbara A. Webb, CPO
Chair

Yvonne M. Aho, R, CPO
Secretary

APPENDIX I

SAMPLE MEMBERSHIP BENEFITS LETTER

DATE

Dear Member:

The Mid-State Paraoptometric Association is proud to welcome you as a new member of our Association. Your new membership certificate is enclosed. Please display it in a prominent place in the office to let others know of your professional involvement.

As a member, you will now be receiving our quarterly newsletter (the MSPA Bulletin) beginning with the Fall issue. It will include highlights and details of previous and upcoming meetings and events. Please let the editor know of any information you feel may be of interest to other members.

As a member, you are also eligible to attend our Fall Educational Seminar at a reduced rate. The Seminar is being held in conjunction with the Mid-State Optometric Association at its annual meeting, November 13-15, at the Franklin Hotel and Conference Center in Anywhere, US. Registration fees for the event are \$40 for members (\$60 for non-members).

Also, please mark your calendar for every third Wednesday of each month and join us at the Mid-State Municipal Building at 7:00 p.m. for our regular meetings. We encourage you to join us, meet new people, and get involved!

Once again, welcome to the Mid-State Paraoptometric Association. Please feel free to call or write to any of the officers if you have any questions or if we can help you in any way.

Cordially,

Sandra Smith, CPOT
President
Mid-State Paraoptometric Association

APPENDIX J

SAMPLE "UPCOMING MEETING" LETTER

DATE

Dear Member:

The next scheduled meeting of the Mid-State Optometric Association will be held on Wednesday, January 23, at 7:00 p.m. at the Mid-State Municipal Building.

We will be featuring a presentation by Dr. Stanley Brown on the topic of Front Office Procedures. In addition, the membership will be discussing the proposal to send a member to represent us at the AOA Congress, as well as our plans for Save Your Vision Week.

Please mark your calendar and make plans to attend.

Cordially,

Sandra Smith, CPOT
President
Mid-State Paraoptometric Association

APPENDIX K

SAMPLE MEMBERSHIP DRIVE LETTER

DATE

Dear Doctor and Staff:

There is a way for you to provide better vision care for your patients - without spending thousands of dollars on new equipment or traveling thousands of miles to learn the newest optometric procedures.

How?

By increasing the skills and abilities of the members of your staff - through their membership in the Mid-State Paraoptometric Association. The MSPA offers a broad spectrum of educational opportunities to help improve paraoptometric skills which, in turn, means better overall vision care for your patients.

The MSPA was founded for the benefit of not only paraoptometric, but for their employers as well. A well-trained paraoptometric can perform many routine office procedures, giving you more time to spend with your patients - and that means better care.

The MSPA also provides an opportunity for paraoptometrics to meet, make new friends, share ideas, and enjoy quality time with their peers.

We would like to invite you and your staff to attend the next meeting of the Mid-State Paraoptometric Association. It will be held on Wednesday, December 19, at the Mid-State Municipal Building at 7:00 p.m.

If you have any questions or would like further information on becoming a member, please contact me.

Cordially,

Sandra Smith, CPOT
President
Mid-State Paraoptometric Association

APPENDIX L

SAMPLE LIST OF POSSIBLE LECTURE TOPICS

Basic Procedures

Slit Lamp
Stereo, Color
Lensometer
Case History Taking

Blood Pressure
Radiuscope
Tonometry

Keratometer
Visual Fields
PD, VAs, NPC, NPA

Front Office Procedures

Office Finances
Front Office Materials
Telephone Management
Triage

Appointment Scheduling
Recalls
Record Keeping

Office Management
Fee Presentation
Patient Management

Pathology and Anatomy

Glaucoma & Tonometry
Nutrition - Eye Health
Ocular Emergencies/First Aid
Over the Counter Medications
for the Eye

Anatomy of the Eye
Understanding Convergence
Laser Surgery
Systemic Conditions &
their effect on the eyes

Cataract Patient Care
Refractive Surgeries
TPAs
DPAs
Ocular Diseases

Specialties

Hard & Soft Contact Lenses
Vision Therapy Philosophy and Techniques
Children's Vision
Instillation of Eye Medications & Patching
Trunk Shows
Certification Review Courses
EHR

Low Vision & Low Vision Aids
Orthokeratology
Pharmacology
New Procedures
Coding and Billing
CPR
Selling 2nd pairs

Dispensing and Lab

Frame Adj. & Repairs
Progressive Lens Addition
Measuring PD's & Seg. Heights
Rx Release
Polishing or Modifying CLs
Frame and/or Tint Selections

Rx's After They Leave Your Office
Lens Tinting
Contact Lens Compliance
Lab Representative on Problem Solving
Verification of CLs
Update on CL Solutions

Third Party Reimbursement

Medicare
Streamlining Paperwork

Insurance Forms
Effective Follow-up

HIPAA

Instructor: _____

Date: _____

Time: _____

Course # _____

APPENDIX M

SAMPLE PARAOPTOMETRIC SPEAKER'S AGREEMENT

AS A SPEAKER IN THE PARAOPTOMETRIC EDUCATION PROGRAM OF THE 20__ MID-STATE PARAOPTOMETRIC SYMPOSIUM, I AGREE TO BE REIMBURSED AS FOLLOWS:

Speaker (full name and abbreviated degrees): _____

Course Title: _____

Course Description And Objectives: _____

Handouts (check one): _____ Will not be distributed

_____ Will be provided to attendees by the speaker

_____ Are enclosed for duplication and distribution

Maximum Class Size: _____ **A/V Or Clinical Equipment Needed** (subject to approval):

Submitted By (signature): _____

Name (please print): _____ **Soc. Sec. No.** _____ - _____ - _____

Mailing Address: _____ **P.O. Box** _____

City/State/Zip: _____

Work Phone: (____) _____ **Home Phone:** (____) _____


Please make a photocopy of this contract for your records and return the completed original and a copy of your resume no later than _____ to:

LOGO & ADDRESS HERE

APPENDIX N

SAMPLE PARAOPTOMETRIC CONTINUING EDUCATION FORM

Three part NCR (no carbon required) continuing education forms are available from the AOA Commission on Paraoptometric Certification at a cost of \$10 per 100 forms. All orders must be prepaid. To place an order, call Sharon Alderson at 800/365-2219, ext. 4210, or e-mail her at salderson@aoa.org

<p>Commission on Paraoptometric Certification 243 N. Lindbergh Blvd., Fl 1 St. Louis, MO 63141 www.cpc.org (800) 365-2219</p> 	<p>RECORD OF CONTINUING EDUCATION (Please provide all information requested below and print clearly.) Upon completion of the course identified below the room monitor will validate and return this form to you. Keep the top white copy for your certification renewal records and retain the remaining copies for your files. AOA does not guarantee that the course you have attended has been approved for continuing education credit.</p>	
	<p>PARTICIPANT INFORMATION</p>	<p>COURSE INFORMATION</p>
	<p>LAST NAME FIRST MI</p>	<p>TITLE</p>
	<p>ADDRESS</p>	<p>COURSE & DATE</p>
	<p>CITY STATE ZIP CODE</p>	<p>CE CREDIT AWARDED (Please circle one)</p> <p align="center">1 2 3 4</p>
	<p>Course/Speaker Evaluation (Please Circle One)</p> <p align="center">POOR FAIR GOOD EXCELLENT</p>	<p>SPONSORING ORGANIZATION</p>
<p>NOT VALID UNLESS STAMPED</p>		<p>INSTRUCTOR(S)</p>