

Chapter Three
A Review Of The Role Of Regional Gatherings
In The History Of The AAMC Group On Business Affairs

Early Thoughts

The importance of a regional structure for the newly formed AAMC Business Officers' Section (later Group of Business Affairs) was stressed early on by the seven founding members with the strong endorsement of Gus Carroll. Speaking to the views of the "Founders' Group," which met initially in October, 1967, he reported, "a great interest in regional meetings has been shown and during the last year some have been held with varying degrees of success. At the committee [Founders' Group] meeting in New York we discussed the possibility of finding a place, date, and sponsoring group of schools for a good meeting which might serve as a model for meetings in other areas. Such a meeting will call for careful long-range planning and early attention." [Letter from AJC to Thomas Fitzgerald, January 10, 1968]

In addition to the educational value of regional gatherings of medical school business officers, the regions' value of furnishing planning input to national standing committees would soon become apparent.

Since the parent AAMC body -- and its subordinate groups, e.g. Group on Student Affairs, -- had been structured along regional lines, i.e. south, northeast, west, Midwest, it was logical for the planners of the new sub-group to think along similar geographic divisions.

Subsequent Actions

The structure of a "Business Officers' Section of the AAMC was taking form in the initial Bylaws, which emphasized the regions' significant role:

IV. REGIONAL ORGANIZATION

1. The purpose of the regional organization shall be to encourage communication between Business Officers' Section members with common regional interests and to provide a forum for discussion of matters to be acted on later at the national meetings.
2. The total number and geographical names of the regional groups shall be the same as regional groups for deans of medical schools and for other A.A.M.C groups.
3. A medical school may be affiliated with more than one region. The dean of the medical school shall designate the region (s) of affiliation and, shall be the primary affiliation.
4. Each region shall have a chairman and a vice-chairman to be elected annually by the representatives of the medical schools having primary affiliation with that region. A simple majority of the voting members is required. Regional groups may also elect a secretary.
5. The regional groups shall hold at least one meeting annually unless a majority of the members with primary affiliation (by mail or at a previous meeting) postpone or cancel a meeting.

6. A summary of the proceedings of the regional meetings should be distributed to all members of the regional group and to the Business Officers' Section Steering Committee. Minutes shall be kept by the Secretary or Vice-chairman.

Mr. Carroll turned to one of the seven founding members, Hugh Hilliard, to spearhead the effort to plan a pilot meeting in the Atlanta area for the southern medical school business officers, to be held May 13, 1968. In his invitation to his colleagues, Mr. Hilliard set some ground rules:

“We would like very much to hold a one-day meeting of all of the Business Officers in the south region . . . As a trial of the type meeting that might be most useful, it is proposed that only one representative from each school, designated by the dean, shall be permitted to attend this meeting. If the representative to the Business Officers' Section of A. A. M. C. cannot attend, he may then elect an alternate.

The format of the meeting would be very informal and would be more of a seminar-type program, rather than formal presentations.

It would be planned to have a discussion leader for each presentation and then for ideas to be exchanged among all of those present with hopefully each of us learning on a very informal basis from the others. It would be extremely helpful if those attending could bring with them samples of the way they handle certain problems and the forms and ideas used in the handling of these particular areas.

The meeting will be a one-day meeting, starting at nine, and the sessions formally ending at about five. In order that we might get better acquainted with each other, it is also proposed that a dinner with all of us being together be held that night.

The location of the meeting is specifically intended so that transportation will be minimized, as the motel is very near the airport, and most persons attending can either come in early on the morning of the conference or come after work the day before and spend the night preceding the conference there.

It is my personal opinion that the regional meetings, being small and very informal, might be the most useful communications device that we can develop.

It is hoped that each school in the south region can be represented at this meeting and that all representatives will come with ideas and solutions to problems that might be of benefit to all others attending.

Some of you will be called upon to act as moderators for the various sections to be discussed, and if you have any preference about which one you might like to volunteer to moderate, please indicate that on the card which you return.”

Southern Region

This pilot meeting was held in Atlanta on May 13, 1968, and 33 representatives of the Southern Region attended. Hugh Hilliard, the Region's first Chairperson, steered the effort. Here they discussed such items of mutual interest as the AAMC's Joint Annual Financial Questionnaire, its Faculty Salary Questionnaire, the Faculty Roster. The assembly also discussed the draft Section By-Laws, possible methods of funding programs for the Section, and the possible development of management training courses

for medical school business officers. The outcome of the Atlanta meeting was regarded as a successful initial step in establishing the role of regional meetings and workshops.

A follow-up gathering of the Region's representatives took place in February 1969 in New Orleans, where Tulane played host. Some thirty business officers were on hand to discuss the following topics: medical school relationships with their teaching hospital(s), academic medical center structure, faculty salary reporting.

In reporting its success to the AAMC Executive Council on June 6, 1968, Dr. Robert Berson indicated that other regional meetings would be held during the summer to address the Section By-Laws, the Faculty Salary Questionnaire, and other management issues of pressing importance to the members.

Northeast Region

Though Tom Fitzgerald (NYU) had convened a small group of New York and New Jersey medical school business officers in December, 1967, to discuss national organizational matters, it was not until July 26, 1968 that the Northeast Region held its first official meeting in New York City, under David Sinclair (SUNY), the Region's first Chairperson. Following generally the path taken earlier by the Southern Region, this group was represented by 28 of the region's 37 medical schools, AAMC staff, and by Joe Diana, the new Chairman of the AAMC Business Officers Section Planning Committee.

There was wide discussion around two major topics -- Organizing Business Services Within a Modern Medical Center, Fiscal Considerations of Medical Service Plans -- with extensive discussion on procedures and models in place at the various institutions represented by those present. The regional gathering also debated the organization plan and by-laws proposed for the new Business Officers' Section.

The following March, the Region conducted a second educational forum at the State University of New York's Conference Center at Oyster Bay, L.I. It was a 1 1/2 day session at which the participants were oriented to sensitivity training.

Midwest-Great Plains Region

Under this Region's leadership of Daniel Benford (Indiana), Midwest-Great Plains held its first regional day-long meeting on December 18, 1968 at O'Hare Airport, Chicago. Regional organization and officers' election were the first order of business, followed by informal workshops. These covered the following topics: Functions of the Business Officer, Services provided by the Medical School Business Office, Maintenance of Records (i.e. coping with questionnaires).

Shortly afterwards, on April 21-22, 1969, the region held its second meeting, under the chairmanship of Gerald Gillman (Minnesota), in Chicago. The business officers of this region began the custom of holding its semi-annual meetings in concert with the representation of the region's Council of Deans, Council of Teaching Hospitals, and the Council of Faculties. The format followed the pattern of the national AAMC meeting in the "First Annual Report of the Business Officers' Section, AAMC" (1969), the regional representative explained that the region's activities had "not been as extensive as the others [regions] partly because of mid-year organizational change as the Region moved to

fulfill one of the recommendations of the Coggeshill report”, which led to the involvement of conjoint meetings of Deans, COTH Representatives, Academic Council Representatives and representatives of this Section from the region’s Medical Schools. Thus, on the positive side, it was further stated that “this group has had an opportunity to communicate with other members of the Medical School management team.” But the representative stated that “the size of the group and the logistics involved in getting membership of this dimension together, has precluded extensive representation of the membership when compared to the other regions.” Nevertheless, fruitful joint discussions took place on such topics as: faculty practice plans, problems with Medicaid and Medicare, program cost allocation studies, and federal support of medical education.

It is noteworthy that the business officer representation for this region totals the largest of the four regions.

Western Region

The educational program of the Western Region got underway in January 1969 under the initial chairmanship of William (Bill) Zimmerman. As its history began, it was noted: “This group enjoys the advantage of being in the region with the smallest number of member schools and so offers this Section an excellent forum for total regional membership discussion on any one topic and endless opportunity for regional, task force type, in-depth studies.” [“First Annual Report of the Business Officers’ Section, AAMC,” 1969] The first education forum was held in San Francisco, and had twenty representatives from among fifteen institutions. The agenda included: the role of the business officer, methods of comparing costs, budgets and operating costs, medical service plans, relationships with federal agencies, business and fiscal relationships with parent institutions, budgeting and health science departments, fund-raising problems.

A follow-up gathering of the region occurred again in San Francisco the ensuing June. At that time, they explored extensively the goals and objectives for the Region, agreeing to establish a program of continuing professional development of the membership. They agreed to collaborate with national plan involving workshops or other professional development activities. They expressed the need for in-depth reviews and studies of business and fiscal management techniques and methods to assist in the future assignment of medical schools.

Canadian Representation

The national structure of the AAMC, e.g. Council of Deans, had for some time included representatives from Canadian medical schools as “associate members.” At its Executive Committee meeting on February 7, 1969, the Business Officers’ Section “RESOLVED, that the Business Officers of Canadian medical schools be invited to associate membership in the Section, which would include invitations to attend national meetings.” [Executive Committee Minutes] By the following year, they had full representation and voting rights. [BOS Bylaws as constituted in 1970] Soon business officers from the Canadian schools became active attendees and participants at regional meetings, especially in the Northeast and Midwest-Great Plains.

The Regions’ Role -- An Early Assessment

At the time of the Second Annual Meeting of the Business Officers' Section, held October 29-30, 1969, the initial year's activities were reviewed by Joe Diana (Michigan), the first BOS National Chairperson. After summarizing the regions' professional activities for the year, he highlighted the true value of the regions:

“ . . . these very brief comments regarding the regional activities do not adequately display the total involvement of our membership, their high interest and personal commitment to the efforts of this organization as observed by those in attendance. There is no doubt that the strength and future growth of this organization lies in the regional development as urged by the Executive Committee. There is also no question that there is sufficient depth in numbers and a wide variety of talent in any one region to afford the Association or a federal or private sponsor with the necessary talent and laboratories for any in-depth study, or case study. In fact, each region could easily select any one topic or problem, each year, for study and resolution, because of mutual interest and mutual need. It is evident that each representative is willing to give a little of himself and his institution to help improve the total knowledge and information about the nation's Medical Schools, because the environment in which he works and lives will automatically improve through such effort.” [First Annual Report of the Business Officers' Section, AAMC, 1969]

Regional Activities -- Post 1970

Beginning in 1969-70, the AAMC received several grants from private and federal sources that influenced the subject matter of the Association's educational programs through its Business Officers' Section and its regional components. The Kellogg Foundation provided funding for the development of four workshops around selected management topics: 1. Relations Within the Medical Center and the Role of the Business Officer, 2. Relations With the Federal Government, Fiscal and Administrative Relations With the Parent University, 3. Medical Service Plans.

Federal funding provided the impetus for studies that followed Gus Carroll's methodology defining the costs of medical school operations. Such studies would make it practicable to compare costs among the medical schools.

As these topics became more fully developed, i.e. workbooks, study plans, etc., they became agenda items for regional meetings. Frequently, regional gatherings occurred twice a year -- often at the site of one of the region's medical schools, and occasionally in conjunction with the National Annual Meeting. In the latter instance, these were to become somewhat rudimentary business meetings for the election of regional officers and reports on the more robust professional workshop to occur in the spring or summer of the following year.