

Officer Reports to the General Assembly

Friday, April 23, 2021

President's Report

In the course of my remarks during the President's Address, I will report on key organizational initiatives that took place during the past year.

I am pleased to report that membership reached a record high in 2019-2020 with a total of 8,100 members. We attribute this success to enhanced recruitment and retention efforts, increased outreach to lapsed members, and improved consistency in communications regarding membership benefits. The current year has been more challenging with membership counts pacing slightly behind last year as members continue dealing with the repercussions of COVID. In 2021, we will be conducting another member needs survey and will utilize those results to increase the value of your AAE membership.

I am very proud that we have continued to make progress towards achieving our strategic goals over the past year. The AAE's Strategic Plan calls for addressing vital issues such as: the public value saving their natural teeth and seek endodontists for treatment; the dental profession valuing endodontists as partners with advanced expertise in providing patient care, and the AAE and its members being recognized as the global leaders in advocating the value and quality of endodontics.

In addition to these strategic goals, this past year the AAE worked tirelessly to support our members through the COVID-19 pandemic:

- Provided members with timely news, research and updates on COVID via a webpage and COVID Briefing emails
- Advocated access to PPE, vaccines and federal relief for members
- Provided members AAE interim guidance on endo practice during COVID-19
- Held a Radio Tour and a Satellite TV tour on the safety and importance of seeing an Endodontist
- Fast-tracked publication of COVID research articles, including early release on aae.org
- Pivoted live meetings to virtual meetings. Provided members free virtual conference and career fair access in 2020.
- Created new member benefits: Launched a COVID members-only community and new COVID webinar series
- Supported educators and residents through Zoom lecture series (over 40 lectures provided by U.S. and international educators to U.S. and Canadian residents thus far) and free access to *Endo on Demand*

The Board Transformation Initiative has been a key focus of our Board this past year. Over the past several years, the AAE Board has dedicated considerable effort to examining how we can most effectively identify and cultivate board members, how we can support diversity in leadership, and how we can enhance our effectiveness and efficiency. The resulting recommendations are available [online](#) and the Board is requesting the General Assembly's approval of the related Constitution and Bylaws changes at this meeting to move forward with this important evolution for our organization.

AAE leadership has continued to maintain strong relations with the ADA, other specialties, and international endodontic organizations.

I am extremely grateful for the opportunity to serve as your President.

Secretary's Report

During the past year as your Secretary, I have overseen development of the Board of Directors' and Executive Committee meeting minutes, and have served as the Board Liaison to the Editorial Board Committee, as a member on the Constitution and Bylaws Committee, and as chair of the Special Committee on Vital Pulp Therapy. In addition, I have served as a Trustee on the Foundation Board of Trustees.

As Secretary, I facilitated the AAE Board's annual self-assessment to measure our effectiveness as a governing body. As a Board, we are thoughtfully comparing those outcomes to results of other association Boards, and consistently seeking opportunities for improvement. The [Board Transformation Initiative](#) is a direct result of the Board's self-assessment efforts over the past several years. In order to move forward with this plan for building a more effective and diverse Board, the General Assembly must approve the related changes to the Constitution and Bylaws.

I attended all meetings of the Board of Directors and the Executive Committee. I am pleased to report that the records of the Association are in order, and I thank you for the opportunity to serve as your Secretary this year.

Treasurer's Report

The AAE leadership recognizes its fiduciary responsibility and accountability to our membership. For our last fiscal year that ended on June 30, 2020, the AAE had an operating surplus after investment earnings of \$277,000. Revenues and expenses in 2020 were impacted by COVID restrictions and the cancellation of AAE20. The impact was partially offset by an insurance claim. Strategic initiative spending total \$568,000 resulted in a bottom line deficit of (\$291,000). Strategic initiatives focus on the public (Worth Saving & Root Canal Truth), profession (advocacy), and membership.

In addition, AAE received a clean audit from our independent auditors. This indicates that our financial operations not only comply with Generally Accepted Accounting Principles, but also that our association is financially sound and that the Board of Directors has operated responsibly and in the best interest of the AAE and its membership.

The AAE Investment balance at 6/30/20 equaled \$10.1 million and was 90% of the expected 2020 annual expenses, which is a healthy financial position.

I would like to acknowledge the hard work of your Budget and Finance Committee, AAE staff and your Board of Directors over the past several years. They have made important and thoughtful decisions that set up our organization up to succeed in a sound financial environment. We all hope to continue in that same spirit of service and fiscal responsibility.

Thank you for the opportunity to serve you as your Treasurer.