

**Orthopaedic Residency/Fellowship SIG (ORFSIG) Report  
2019 CSM Board of Directors Meeting  
Washington, DC**

**Submitted by:  
Matt Haberl, President  
Academy of Orthopaedic Physical Therapy, APTA**

**SIG Members and Terms:**

Matt Haberl, President	2018-2021
Kathleen Geist, Vice President	2018-2021
Matt Stark, Nominating Chair	2018-2019

**Update on SIG Activities since February 2018:**

**Chair Update- New information is BOLDED.**

***1. ABPTRFE New Quality Standards, Policies and Procedures, Descriptions of Residency Practice updates***

- a. Following CSM 2018 the ABPTRFE pushed back the implementation of the New Quality standards to 2020 given several questions that came from the Academy/Section Res/Fellowship Leadership meeting in New Orleans.
- b. June 2018 – ABPTRFE released new Policies and Procedures as well as the new Annual Continuous Improvement Report with Exhibits 2 and 3 to replace the previous Annual Report.
  - i. Included in the reports was the reporting of Primary Health Conditions which are a part of the new Quality Standards. The ORF-SIG received several questions regarding the submission of these for the 2018 year given implementation does not occur until 2020. Discussion did ensure with Kendra Harrington to clarify the discrepancy where programs can still submit the old patient condition chart with any resident/fellow who is involved in the program in 2020 will have to use the new format.
    1. The ORF-SIG has brought forth program concerns to the use of the Primary Health Conditions and additional burden this will ultimately put on residents/fellows without any valuable learning included. ABPTRFE response has been that it did work with Section/Academy leadership in the development of these conditions in collaboration with the Registry. A Meeting has been established with James Irrgang, Joe Donnelly, Aimee Klein and Matt Haberl as CSM on Friday to understand fully the extent to which the Academy was aware.

- ii. As programs began to work on Exhibits 2 and 3 it became apparent the expectations for this first years annual report was significantly different than years past. The ORF-SIG receive several questions regarding completing these documents. Given the challenge programs were reporting and our upcoming course on assisting programs to meet the new Quality Standards we requested the January 31<sup>st</sup> deadline be moved back. Unfortunately this was denied by Kendra noting that it is always “policy” for the 31<sup>st</sup> deadline.
- c. **November 2018 – Complimentary documents to the Policies and Procedures including Substantive changes was released.**
  - i. **Following the release of these documents several question arose regarding the new Substantive Change requirements for required additional site visits funded by programs when a site grows by greater than 2 sites or participants in a single reporting year.**
    - 1. **In collaboration with Elaine Lonnemann, AAOMPT President, and Cameron McDonald, AAOMPT Fellowship Program Director Special Interest Group President, and Julie Whitman, a survey was developed to evaluate how this would impact Orthopaedic Res/Fellowship Programs.**
      - a. **Of the 57 Ortho Programs who responded (Total 104 programs- 57%)**
        - i. **24 (42%) are unsure or will not keep their accreditation status with ABPTRFE.**
        - ii. **They make up 356 of the 533 clinical sites that are offered (67%).**
        - iii. **311 of the 436 annual resident graduates (71%).**
    - 2. **Given the considerable impact on programs the discussion of the Academy creating a work group to determine if an alternative accreditation/credentialing process can occur. Further discussion will occur at CSM 2019.**
    - 3. **AAOMPT PD-SIG has encouraged its member write ABPTRFE regarding these policy requirements with several considering an alternative route via AAOMPT to still meet IFOMT standards.**

## **2. Strategic Planning**

- a. **Orthopaedic Academy Strategic Planning Grant funding was provided to Janet Bezner to facilitate the development of the strategic plan. Janet has met with our strategic planning group via WebEx three separate occasions with our Mission, Vision, Goals and Objectives to be announced at our CSM 2019 meeting.**
- 3. **ABPTRFE Ad-Hoc Section R/F SIG Chair Committee**

- a. **Met again on Thursday, November 15 from 10:30am to 11:30am EST** where SIG Chair Committee shared updates with what their Section/Academies were completing. Key discussion items included
    - i. **Clarification of Annual Continuous Improvement Report, Exhibits 2 and 3 submission, substantive changes, and the timeliness of these requests.**
    - ii. **Process for providing feedback and recommending process changes. The current process is for programs to send requests to Kendra Harrington, at ABPTRFE where she will collect and answer any questions. Concerns then will be provided to the New Quality Standards Committee which will review at their annual meeting and then submit recommendations to the board for consideration.**
    - iii. **Development of a Mission and Plan for the Leadership Group**
    - iv. **The Hand Section noted requests for their programs to be Residencies versus fellowships was denied where they will be considering pulling from the APTA for accreditation and specialty certification. So far 1 program has already pulled out and are pursuing an alternative method. They are requesting assistance with this matter.**
    - v. **The Education Section RF-SIG will be releasing resources for programs regarding common content that could be used across programs. This is located on the APTA HUB. They have also established a research group where the ORF-SIG will be meeting with them at CSM.**
  - b. Next meetings
    - i. CSM Saturday, January 26 from 6:45am to 7:45am EST
4. ***Education Section Residency and Fellowship Special Interest Group (RFSIG) Collaboration***
- a. Following initial collaborative mentorship webinar with ED-RFSIG on Mentoring the Mentor. **Continue to work with Kris Porter (ORF- SIG) Arlene McCarthy (Neurology) and Carol Jo Tichenor (ED-SIG) regarding the development of an Annual Mentor Evaluation and Development Tool. Currently we are trialing the tool and will determine future use.**
  - b. ***RFESIG Think Tank***: Resources have been collected and are being posted to the APTA HUB.
5. ***Working Committees***
- a. Committees:
    - i. **Quality Standards Review Work Group**: Given the ongoing changes with the new Quality Standards a working committee was developed to better assist our members. Kevin Farrell, Tina Hertlein, Brian Eckenrode, Frank Hofer, Molly Malloy, Kirk Bentzen have elected to assist in the review and education regarding the new Quality Standards.
      - 1. **This group never took off given the CSM course offering. Will re-evaluate group pending further developments.**

- ii. **Res/Fellowship Applicant Aggregate Data Review:** A work group including: Peter McMenamain, Tom Denninger, Kevin Farrell, Joe Donnelly will be evaluating low resident application volumes / way for programs to know of potential openings in other programs to share with residents not accepted in the future.
  - 1. **Peter McMenamain followed up with Ryan Bannister regarding some of the information sharing restrictions between RF-PTCAS and ABPTRFE. A meeting has been proposed to determine any alternative routes.**
- iii. Standardized application date / sharing applicants
  - 1. Stephan Kareha lead a group where they developed a survey to understand program interest.
    - a. **Currently only 49% of residency and 30% of fellowship programs would be interested in common application process. Will not pursue this at this time.**
- iv. Residency/Fellowship Administration Survey
  - 1. Kathleen Geist, Stephan Kareha and Kris Porter are working on a Survey to evaluate current pay for residency directors, administration time for PD's and faculty/mentors to serve as a resource for current and developing programs.
    - a. **Survey is complete and will be sending out in next month.**

6. *AAOMPT collaboration and communication*

- a. Discussion has continued with AAOMPT President Elaine Lonnemann regarding the new Quality Standards and Fellowship mentorship hours, pre-requisite requirements and mentor requirements.
  - i. Most recently AAOMPT developed a Description of Fellowship Practice with recommendations to maintain consistency with IFOMT standards which was reviewed at the May ABPTRFE meeting. Discussion here is still ongoing.
  - ii. **Collaborated with discussion around the new ABPTRFE Policies and Procedures and alternative accreditation process.**
    - 1. The ORF-SIG will continue to provide support here as needed.

7. *2018 Budget / Member attire*

- a. Mary Derrick identified and worked with Tara Fredrickson regarding purchasing leadership clothing, pens and shaker bottles. Items will be provided to SIG leadership and to distribute to members and aspiring members at upcoming national meetings (NSC and CSM). **These were a big hit at NSC.**

8. *National Student Conclave*

- a. ORF-SIG sent a representative with Academy office to APTA's National Student Conclave to recruit members and provide resources to aspiring Res/Fellows regarding the value of R/F education, how to choose a program etc. **We had a tremendous turnout as several PT students stopped by with questions**

**regarding the different types of residency programs, how to choose and what to expect. Several found the OP issue evaluating the different types of programs helpful in their evaluation process.**

**9. CSM Pre-Con Course Accepted**

- a. “Clinical excellence and quality standards in Residency/Fellowship Education” on Wednesday, January 23rd at CSM. Kirk Bentzen, Kathleen Geist, Aimee Klein, Tara Jo Manal, and Eric Robertson. To include breakout discussions to discuss methods in meeting the new ABPTRFE Quality Standards. Group is actively working on content and marketing strategies.

**10. CSM R/F Program Social discussion**

- a. In 2018 ABPTRFE discontinued their Residency and Fellowship social offering at CSM and moved this to National Student Conclave. With this move several programs requested that the ORF-SIG host and similar social for orthopaedic residency and fellowship programs. Upon evaluation, 74 Orthopaedic R/F programs previously attended this to now just 18. Of the 18 only 2 are fellowship programs. AAOMPT President Elaine Lonnemann also reached out inquiring about co-sponsoring an event. **The ORF-SIG worked with the Academy office in identifying avenues for this completed and are still discussing options.**

**11. Website Development:**

- a. **Our website is up and running. Matt Stark and Kris Porter are recommending modifications to fit the new headlines.** Still utilizing Facebook Groups and looking at other avenues of member communication. Will continue to work with the PR committee in generating member engagement and information sharing.

**12. OPTP Quarterly Submissions:** Marketing to current programs to highlight R/F work. We look forward to future submissions. Will also use this as an avenue to publish current research.

**13. Regular Meetings:**

- a. Quarterly meetings are scheduled throughout the year to address strategic planning initiatives.
  - i. **CSM: January 24<sup>th</sup> 6:45 am EST**
  - ii. **WebEx: April 17<sup>th</sup> 10am CST**
  - iii. **WebEx: July 24<sup>th</sup> 11am CST**
  - iv. **WebEx: October 23<sup>rd</sup> 12 noon CST**