ADVANCING THE SCOPE

2019 ANNUAL REPORT

AANA
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WE LISTEN. WE PROVIDE. WE CULTIVATE.

As AANA enters a new decade, we can once again celebrate a year of substantial growth and impressive achievements. We’ve worked hard to increase our global presence in new ways that showcase our focus on education, innovation, and development.

In spite of current health issues that threaten our way of life, not only in the United States but throughout the world, we believe in a positive, healthy future. Our foundation of listening to our membership allows us to provide the life-changing resources surgeons need, and our culture of collaboration means that our members can excel at the highest level possible.

In the following pages, you’ll read about the many highlights of this past year, and you’ll also get a preview of what we envision for the AANA in 2020.

We’re honored to be at the helm of such a dedicated group of members. We truly believe that no other organization is better at developing strong global connections than AANA, and we are committed to coming up with innovative solutions the minimally invasive surgical profession is looking for.

Larry D. Field, M.D.  
AANA President of the Board of Directors, 2019–2020

Laura M. Downes, CAE  
Chief Executive Officer
For the last several months, the AANA Board of Directors (BoD) has thought a lot about the organization’s focus on education, innovation, and development, and how to increase global awareness of AANA and the expertise we provide.

Our objective was to rebrand the association in order to increase its relevance not just to its thousands of members and donors worldwide, but also to patients seeking trusted resources and treatment options. Our members expect the very best support, just as their patients expect the very best care.
AANA is proud to announce the launch of our full rebrand and our new tagline:

ADVANCING THE SCOPE

This rebrand affirms our commitment to providing education and events not just in North America, but worldwide. “Advancing the Scope” implies uniqueness and forward thinking, positioning AANA as an innovative global resource and community.

Our rebrand also reaffirms the values that make us successful:

**TAKING IT TO THE NEXT LEVEL**
We go the extra mile to gain the confidence of our members, and further the organizational mission.

**UNSURPASSED QUALITY**
Beyond planning meetings and offering courses, we emphasize quality because it’s who we are. We extend this quality to our physician members so they can provide the highest-quality patient care.

**PASSION FOR EDUCATION**
Education is our foundation. Through our lab courses, annual meetings, and journal iterations, we provide our members with leading-edge education in the field of orthopaedics.

**INNOVATION & GROWTH**
We support innovation and creativity. We encourage progressive, out-of-the-box thinking to generate new ideas, innovate our processes, and ensure our members’ expanding needs are met.

**CONSISTENT ADAPTABLEITY**
As technologies and operations evolve, we evolve with them in order to remain leaders in our field.
WHO WE ARE

For almost 40 years, the Arthroscopy Association of North America (AANA) has provided innovative education and informative resources that have reshaped orthopaedics. We’ve positioned ourselves as the world’s leading international orthopaedic association focused on minimally invasive surgery and related modalities thanks to our various resources, events and tools offered every year.

EDUCATION ADVANCEMENTS

- Changes and developments were made to lab courses to enhance the attendee experience
- Course maximums were increased due to the addition of four new towers in the lab space
- Enhanced content was added in ultrasound and other technologies
- Elevated marketing collateral was created to highlight course content
- Increased engagement with industry partners offered attendees information on the latest developments in devices and techniques via exhibits and non-CME sessions
- An aggressive effort was made to obtain optimal dates for future courses, which accounted for calendar conflicts
- A highly successful 10th Anniversary AANA/SOMOS course was held that included special visuals, décor, photography, catering, and media coverage as celebratory aspects, and a lecture by retired Navy Seal Captain Tom Chaby
WHERE WE’RE GOING...

With our rebrand complete, AANA envisions a bright future built on a foundation of listening, providing, and cultivating:

**WE LISTEN**
to our members to understand the resources they need to provide surgical solutions that change lives.

**WE PROVIDE**
the resources surgeons need to perform their jobs successfully.

**WE CULTIVATE**
a culture of collaboration and learning so that our members can perform at the highest level.

With our support, more than 5,700 arthroscopic surgeons worldwide are advancing the field of minimally invasive orthopaedic surgery to benefit their patients – and we’re growing every day. Visit our website to learn more about AANA and our vision for a healthier world: [aana.org](http://aana.org)

AANA’s culture continues to be innovative and diverse. As we enter a new decade, our new branding better reflects our commitment to listen to our members and to provide the resources they require to provide life-changing surgical solutions.
2019 AANA LAB COURSES

UPDATE ON VIRTAMED PARTNERSHIP
The new AANA J. Whit Ewing, M.D. Simulation Room was officially dedicated in the Fall of 2019 with a ribbon cutting ceremony, media exposure and other fanfare. The room, housing eight VirtaMed simulators, allows for more innovative programming. Additionally, dedicated simulator time was incorporated into most AANA Lab Courses, including the Residents and Fellows courses and the Proficiency-Based Learning course.

2019 AANA LAB COURSE ACHIEVEMENTS
• SOMOS update – number of surgeons educated through our SOMOS course since the beginning: 281
• Total lab course attendees in 2019: 523
• Total faculty for courses and annual meeting: 495 unique courses
• Total residents and fellows trained in 2019: 230

WHAT ELSE IS NEW?
• Updated joint models and other upgrades were installed
• VirtaMed created the functionality to make software updates remotely
• AANA Staff and VirtaMed worked together on a streamlined log in process to reduce time and optimize data capture
• A new three year contract extension is in the final stages of negotiation
• Focused efforts were made to gather, organize and synthesize simulator data in order to evaluate any correlations between simulator training and hands-on lab training

PBP HIGHLIGHTS
The first ever Copernicus/Proficiency-Based Progression (PBP) course took place in September 2019. Drs. Richard Angelo and Patrick St. Pierre oversaw several planning milestones in advance of the course which included:

• February 2, OLC – Rosemont: Film capture of rotator-cuff repair using cadaveric specimens for use in faculty training
• April 5, OLC – Rosemont: Capture of 11 procedures using cuff models and select associate faculty from Shoulder Super Stars course to establish model procedure baselines
• May 5, Orlando, FL – Gaylord Palms: Train-the-Trainer course with all course faculty
• Pre-course: Pre-test and informational questionnaire for 18 fellow attendees and two refresher webcasts for all faculty
• September 20–22, OLC – Rosemont: A total of 18 learners attended the course, with 26 faculty divided into appropriate rater groups and instructors based on expertise. Drs. Richard Angelo and Patrick St. Pierre served as co-chairs and Drs. Joe Tauro and Tony Gallagher served as associate co-chairs. The other 22 faculty included five AANA past-presidents, current president Dr. Larry Field, and some of the most eminent arthroscopic surgeons in the field.

The learners progressed through knot-tying, rotator cuff, and Bankart repair using specially designed models, and then rotator cuff and Bankart repair using cadaveric specimens. During each segment, learners were scored based on validated metrics.
2019 AANA ANNUAL MEETING

ACHIEVEMENTS

Over 230 faculty presenting, including:

- 10 Ask the Expert Sessions
- 24 Case Presentations
- 17 Featured Lectures
- 21 Master Series Presentations
- 12 International faculty from the Nations of Argentina and Ireland
- A total of 15 post-meeting ICL CME offerings were released, the highest number for a single AANA Annual Meeting to date

- The new online education program, the All-Access Pass, was created and provides annual meeting content available by joint
- Greatest number of active industry partners in three years. (We only have data going back three years – it could even be more!)
<table>
<thead>
<tr>
<th>Category</th>
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<td>2019 Annual Meeting Attendee Total</td>
<td>906</td>
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<tr>
<td>(14.5% decrease from 2018)</td>
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<tr>
<td>2019 Annual Meeting Attendee Percentage Change from 2018</td>
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<td>2019 Annual Meeting International Attendee Total</td>
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<td>2019 Annual Meeting Country Total</td>
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<td>Exhibitor Total</td>
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<tr>
<td>Industry Partner Total</td>
<td>17</td>
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</table>
FORWARD THINKING: WHAT’S COMING IN 2020?

We will launch multiple Course Lecture Pearls featuring content from the best AANA lab courses augmented with questions posed from the expert faculty. This will increase AANA’s e-learning portfolio and provide a new format of “available anytime” education to AANA members.

There is a newly formed e-learning Work Group to focus on new product development for 2020 and beyond. The goal is to develop new products that will generate revenue, offer CME, serve as reinforcement education, and attract attendees to AANA face-to-face CME activities.

We will continue to increase education in orthobiologics as part of the Biologic Association.

We will undergo a retool of PROBE, AANA’s push-learning initiative to easily deliver CME right to members’ inboxes.

There will be fewer but more comprehensive lab courses with revised pricing and increased involvement of associate faculty, providing dozens more lectures with alternate perspectives and more nuances in arthroplasty.

A pilot for a new “step-wise” educational offering involving pre-course learning, face-to-face lectures and lab experience, and post-course reinforcement learning will be offered. This approach will better prepare learners for their time during live-education and extend their learning well past the standard “course” experience.

There will be activities in collaboration with organizations including the Association for Shoulder and Elbow Surgeons (ASES) and the International Society of Knee Surgery and Orthopaedic Medicine (ISAKOS).

2019 AANA/ORS/ON CLINICAL TRANSLATIONAL FORUM IMPROVING ROTATOR CUFF HEALING

Moderators Drs. Brian J. Cole and Gloria Matthews led a session with Drs. Scott A. Rodeo, Andrew F. Kuntz, and Jason Dragoo to discuss the one-year research collaboration between AANA, the Orthopedic Research Society (ORS), and the Orthoregeneration Network (ON). The focus was on the basic science of rotator cuff disease, including the biologic basis of muscle, tendon, and bone. Current and future solutions were presented, followed by a discussion and voting on a proposal.
ARTHROSCOPY – THE JOURNAL OF ARTHROSCOPIC AND RELATED SURGERY

Nowhere is minimally invasive surgery explained better than in Arthroscopy, the leading peer-reviewed journal in the field. Every issue enables you to put into perspective the usefulness of the various emerging arthroscopic techniques. The advantages and disadvantages of these methods—along with their applications in various situations—are discussed in relation to their efficiency, efficacy and cost-benefit.

NEW IN 2019!

ARTHROSCOPY TECHNIQUES
The new Arthroscopy Techniques YouTube channel was established and you can expect regular content posted covering new industry information and tips.

ARTHROSCOPY, SPORTS MEDICINE, AND REHABILITATION
This journal is broad in scope and covers topics ranging from arthroscopic and related surgery to orthopaedic and primary care sports medicine, physical therapy and rehabilitation, athletic training, musculoskeletal imaging, economic and large database analyses and public health.

IN THE STUDIO
The AANA Podcast launched in 2019 and has been posting episodes weekly. Discover the podcast now on iTunes.

CONNECT WITH US!

Follow us on Twitter, Instagram, Facebook, YouTube, and LinkedIn to receive regular industry and event updates.

THE JOURNAL
@ArthroscopyJ
@arthoscopyj_atech_asmar
@Arthroscopyjournal

AANA
@AANAORG
@AANAORG
@AANAORG
Arthroscopy Association of North America
Arthroscopy Association of North America
MEMBERSHIP

In 2019, Dr. Larry Field led the charge to push AANA’s reach to 5,000 members globally. Through increased international outreach, the new Residency Partnership Program and an integrated marketing and communications plan, the goal was achieved and surpassed. AANA currently supports more than 5,700 Orthopaedic Surgeons worldwide – and growing!
RESIDENT/FELLOW CENSUS

In 2019 the Residency Partnership Program was launched by the AANA Membership Committee, chaired by Dr. Paul Caldwell. The program’s purpose was to propose a partnership to Orthopaedic Residency Programs across the U.S. where each Resident was given an AANA membership automatically. The AANA membership then supported the Residency Program and Resident through benefits such as education and networking.

2020 PLANS

Continued growth through international relationship building, the Residency Partnership Program and member benefit development. AANA is excited to launch new benefits throughout 2020 that meet the needs of physicians at specific points of time in their career, including:

- OrthoLive, a telehealth solution specifically for Orthopaedic Surgeons.
- Discounted, at-home learning kits from Sawbones.
- Doctors Without Quarters student loan repayment and forgiveness programs.
- Member perks discount program through Abenity.

AANA Membership allows us to recognize that we become better surgeons through exchanges of insights, solutions and pearls with our colleagues from around the world. AANA’s outreach continues to expand globally as its number of International Members rises each year. No organization builds and fosters peer-to-peer, global connections better than AANA.

—Dr. Larry D. Field, AANA President
LEADERSHIP

We are grateful to our volunteers that help guide and lead AANA. Thank you to all of our volunteers for their participation and partnership to continue improving our association.

2019–2020 BOARD OF DIRECTORS

PRESIDENT
Larry D. Field, MD

FIRST VICE PRESIDENT
Brian J. Cole, MD, MBA

SECOND VICE PRESIDENT
Mark H. Getelman, MD

TREASURER
James W. Stone, MD

IMMEDIATE PAST PRESIDENT
Louis F. McIntyre, MD

PAST PRESIDENT
Robert E. Hunter, MD

BOARD OF DIRECTORS
Julie Dodds, MD
Patrick St. Pierre, MD
J. Martin Leland, MD
Pietro M. Tonino, MD
Denver T. Stanfield, MD
Paul E. Caldwell, MD
Nikhil Verma, MD
## 2019–2020 Committee Chairs and Staff Liaisons

### Council on Governance

**Bylaws**
- **CC:** Merrick Wetzler, MD  
  **SL:** Laura M. Downes, CAE

**Committee of Committees**
- **CC:** Brian J. Cole, MD, MBA  
  **SL:** Laura M. Downes, CAE

**Development**
- **CC:** Alan S. Curtis, MD  
  **SL:** Shantal Alonso, JD

**Finance**
- **CC:** Brian J. Cole, MD, MBA  
  **SL:** Dave Hood

**Membership Committee**
- **CC:** Paul E. Caldwell, MD  
  **SL:** Christine Nogal, MBA, CAE

**Nominating**
- **Chair:** Robert E. Hunter, MD  
  **SL:** Laura M. Downes, CAE

### Council on Education

**Education**
- **CC:** Kevin Bonner, MD  
  **SL:** Kim Santaniello

**Fellowship**
- **CC:** Brian R. Waterman, MD  
  **SL:** Becca Daly

**International**
- **CC:** Pietro M. Tonino, MD  
  **SL:** Laura M. Downes, CAE

**Learning Center**
- **CC:** Joseph C. Tauro, MD  
  **SL:** Kim Santaniello

**Research**
- **CC:** Ivan Wong, MD  
  **SL:** Travis Whitaker

### Council on Communications

**Communications/Technology**
- **CC:** Jonathan B. Ticker, MD  
  **SL:** Christine Nogal, MBA, CAE

**Council on Government Affairs**

**Advocacy**
- **CC:** Eric C. Stiefel, MD  
  **SL:** Becca Daly

**DOD Committee**
- **CC:** Robert E. Hunter, MD  
  **SL:** Laura M. Downes, CAE
FINANCES

To be a good partner and achieve our goals, AANA needs to manage our finances responsibly for the long term. Effective financial management benefits our members and donors by giving them the assurance that we will meet the commitments we’ve made to achieve advances in education, research, advocacy and patient care.

- 23% of all AANA income stemming from member dues
- 15% of all AANA income stemming from grant funds
- 55% of all AANA funds allocated for educational programming
### AANA SOURCES OF INCOME
- **23%** Membership Dues
- **18%** Royalty Income
- **22%** Educational Meetings
- **15%** Foundation Grants
- **12%** APEx Courses
- **5%** Editorial Support

### AANA USE OF FUNDS
- **55%** Education
- **26%** General and Administrative
- **11%** Publications
- **7%** Governance and Member Services
- **1%** Research

### ASSETS

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<td>Inventories</td>
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<td>$346,091</td>
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<td>Property &amp; Equipment</td>
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<td>Investment – Ortho Properties, LLC</td>
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<td>Other</td>
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<td><strong>Total Assets</strong></td>
<td><strong>$7,821,309</strong></td>
<td><strong>$12,684,379</strong></td>
<td><strong>$20,505,687</strong></td>
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### LIABILITIES & NET ASSETS

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<td>Liabilities</td>
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<td>Accounts Payable and Accrued Expenses</td>
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<td>Deferred Revenues</td>
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<td><strong>$12,684,379</strong></td>
<td><strong>$20,505,687</strong></td>
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SEEING BEYOND THE SCOPE

The AANA Education Foundation provides and helps underwrite various educational programs for AANA members and the community at large. The Education Foundation also connects with corporate sponsors and individuals donors to help AANA continue to improve its offering. The Foundation truly helps us grow as an organization that advocates, educates, and innovates the minimally-invasive surgical field.

- Contributions to AANA in 2019: **$1,017,727**
- Education initiatives funded: **15+**
- Funds allocated for research awards: **$100,000**
- Number of scholarships: **30+**

THE EDUCATION FOUNDATION BOARD OF TRUSTEES

**CHAIR**
Nicholas A. Sgaglione, MD

**TREASURER**
William R. Beach, MD

**SECRETARY**
Richard L. Angelo, MD

**MEMBER-AT-LARGE**
Jack M. Bert, MD
James C. Esch, MD
Danny Lee
John C. Richmond, MD
Gary Scheel
Savio Woo, PhD
CORPORATE GIVING:

Together, we created a new, dedicated Corporate section on the AANA website listing Opportunities, Benefits, Recognition, Resources, and Value Proposition. Additionally, we created forms for industry to fill out and express interest to improve automation and user experience.

NEW! Corporate Support Package designed for current and prospective industry partners to deliver tangible ROI, improve transparency, respond to industry feedback, streamline the request process, and enable customized packages:

• One-page brochure with AANA value proposition
• Four-page brochure “Why Partner with AANA?” with metrics and value proposition highlighting statistics and achievements in innovation, advocacy, donations, education, membership, and organizational awards
• Corporate opportunities menu
• Corporate benefits by support level

NEW! Industry Day in November included a formal luncheon, reception, and dinner with the AANA Board and one-on-one industry meetings with AANA leadership. **Companies in attendance: 7**

In response to industry feedback, new corporate giving levels were created to encompass all corporate giving to AANA (i.e., education grants, marketing, sponsorships, exhibits, etc.).

**NEW CORPORATE GIVING LEVELS:**

• Diamond: $500,000+
• Gold: $100,000–$499,999
• Silver: $50,000–$99,999
• Bronze: Up to $49,999

NEW PROGRAMS AND INITIATIVES

FELLOWS SCHOLARSHIPS

• **NEW!** Four donor-funded scholarships to Fellows Course
• **NEW!** Education Foundation provided four partial scholarships for Fellows Course to help boost attendance

INTERNATIONAL RESIDENT SCHOLARSHIPS

• Increased to five this year
• Streamlined application process to allow one annual application for all courses

`New Programs and Initiatives continued on next page`
NEW PROGRAMS AND INITIATIVES CONTINUED

RICHARD B. CASPARI SOCIETY
• Launched in 2019 in honor of Dr. Richard B. Caspari
• Criteria to join: Lifetime giving of $50,000 in cash or a combination of $200,000 in cash and legacy gifts

CASPARI LEGACY CAMPAIGN:
• Launched the most successful individual campaign to date
• Initial goal: $100,000 (later increased to $150,000)
• Raised $467,763, surpassing initial goal by 367%
• 26 new Caspari Society members with 44% conversion rate from the Jackson Society
• Of these 26, four were completely NEW donors

EMERGING LEADERS SOCIETY:
• Launched in September 2019 to connect individuals with the next generation of AANA leaders
• Criteria to join: $5,000 pledge over five years
• Six commitments in 2019 for total of $30,000

LINDA & RICHARD RYU AANA/SOMOS CHALLENGE: GOAL = $100,000
• Total raised: $102,910 ($50,000 from Dr. Ryu’s pledge; $52,910 from campaign efforts)
• Raised an additional $82,500 from industry to help defray program costs

SPEAKEASY CASINO NIGHT DONOR RECEPTION AT AANA19

NEW GIVE NOW PAGE BY DONATION BUCKETS WITH CUSTOM ONLINE FORMS:
To enhance the donor experience and improve visibility regarding the various giving options, we completely redesigned the online Give Now page by moving away from a generalized form to detailed descriptions outlining various giving buckets (i.e., by program, specific appeals, tributes, pledges, legacy gifts, societies, etc.) along with their respective custom forms.
Our donors mean a great deal to us. We are honored and privileged to connect with our donors on a level that helps shape the future of arthroscopy. We thank you for sharing our vision of seeing beyond the scope.

$582,208
INDIVIDUAL GIVING TOTAL

238
NUMBER OF INDIVIDUAL DONORS

$432,500
FUNDS FROM CORPORATE GRANTS

$127,301
FUNDS RAISED FROM AANA19-RELATED GIVING
CORPORATE SUPPORTERS

On behalf of AANA and the AANA Education Foundation, we wish to thank the following companies for their generous support:

**DIAMOND ($500,000+)**
- Arthrex, Inc.
- ConMed
- DePuy Synthes Mitek Sports Medicine
- Smith & Nephew
- VirtaMed

**GOLD ($100,000 TO $499,999)**
- Zimmer Biomet

**SILVER ($50,000 TO $99,999)**
- DJO Global
- Stryker

**BRONZE (UP TO $49,999)**
- 3D Systems Simbionx
- Active Implants
- Aesculap Biologics
- AME International / Orthotec
- Arthrosurface
- Aventic LLC
- Beama Life Corporation
- Bioventus
- BoneFoam
- Breg
- Cannuflow
- Ceterix Orthopaedics
- enlightenVue
- Flexion
- ICONN Orthopedics
- Incrediwear
- Innomed
- Integrated Endoscopy
- IntraVu, Inc.
- JRF Ortho
- Karl Storz Endoscopy-America, Inc.
- Lipogems
- Maruho Medical
- Metrik Medical/Arcuro
- Mininvasive
- Olympus
- Organogenesis Surgical & Sports Medicine
- Parcus Medical, LLC
- Pristine Surgical
- Regenacell Therapy, Inc.
- RTI Surgical
- SAGE Publishing
- SawBones/Pacific Research
- Top Shelf Orthopedics
- Trice
- Vericel Corporation
- Wolters Kluwer
- Xodus Medical

LEGACY DONORS

**$500,000 AND ABOVE**
- James C. Chow, MD & Ada Chow

**$100,000 TO $499,999**
- Jack M. Bert, MD & Mary Bert
- Larry D. Field, MD & Cindy Field, MD
- William A. Grana, MD*
- John C. Richmond, MD & Chris Richmond
- Benjamin D. Rubin, MD
- Richard K.N. Ryu, MD & Linda Ryu
- Felix "Buddy" Savoie, III, MD & Amy Savoie

**$50,000 TO $99,999**
- Jeffrey S. Abrams, MD & Kathleen Abrams
- Richard L. Angelo, MD, PhD & Marguerite Angelo
- James C. Esch, MD
- Vipool K. Goradia, MD
- Robert E. Hunter, MD & Patti Hunter
- Peter R. Kurzweil, MD
- James H. Lubowitz, MD & Gina M. Papa
- Scott E. Powell, MD

**$25,000 TO $49,999**
- William R. Beach, MD & Betsy Beach
- Patrick E. Clare, MD

**UP TO $24,999**
- Frederick M. Azar, MD
- Bruce E. Baker, MD
- Charles A. Bush-Joseph, MD
- Peter T. Simonian, MD
**RICHARD B. CASPARI SOCIETY**

The Richard B. Caspari Society was created to recognize those individuals who have, through their generous contributions to the AANA Education Foundation, advanced the vision of one of the original pioneers in arthroscopic techniques for the shoulder and former AANA President, Richard B. Caspari, M.D.

In order to qualify for the Society, individuals must have contributed a lifetime amount of either $50,000 in cash or a combination of $200,000 in cash and legacy gifts to the AANA Education Foundation.

Jeffrey S. Abrams, MD & Kathleen Abrams
Richard L. Angelo, MD, PhD & Marguerite Angelo
William R. Beach, MD & Betsy Beach
Jack M. Bert, MD & Mary Bert
James P. Bradley, MD
Brown Family Foundation
Stephen S. Burkhart, MD & Nora Burkhart
Robert T. Burks, MD

J. W. Thomas Byrd, MD & Donna Byrd
Thomas R. Carter, MD
Richard B. Caspari, MD* & Judy Caspari
James C. Chow, MD & Ada Chow
Brian J. Cole, MD & Emily Cole, JD
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