

Agenda
Executive Committee
AANS/CNS Joint Section on Disorders of the Spine and Peripheral Nerves
Philadelphia Marriott
Monday September 23, 2002 12:15 pm

Call to order
Review minutes (4/8/02)

N Baldwin
C. Branch

Treasurer's Report
Old Business

R. Rodts

Spine Fellowships
SPORT Study
World Spine
CSRS
Peripheral Nerve Task Force
Joint Section Member Services
Spine Section Research Fund
ABSS

P. McCormick
J. Guest/P. Gerszten
E. Benzel
R. Apfelbaum
R. Midha
R. Meyer
C. Dickman/R. Varner
N. Baldwin

Committee Reports

Washington Committee
Publications Committee
Research Committee
Annual meeting
Exhibits
Future Sites
Education Committee
Membership Committee
Nominating Committee
Newsletter
Rules and Regulations
Web Site
Awards Committee
Coordinating Committee
Outcomes/Guidelines Committee
CPT Committee
Neurosurgery P.A.C.
Public Relations

R. Fessler
V. Traynelis
J. Guest
J. Alexander/ D. Resnick
M. McLaughlin
S. Papadopoulos
R. Heary
C. Lauryssen
P. McCormick
J. Hurlbert
D. DiRisio
A. Levi
C. Paramore
Z. Gokaslan
D. Resnick
G. Przybylski
S. Ondra
G. Pait

New Business

Think First
Spinal Stenosis Study
Lauryssen Survey

R. Rodts
M. Hadley
C. Lauryssen

Utah Rating Project
Committee Grid Review
Executive Membership Directory

N. Baldwin
C. Branch/N. Baldwin

*✓ E Ron A re: CSRS
venture*

Meeting of the Executive Committee
AANS/CNS Joint Section on Disorders of the Spine and the Peripheral Nerves
Monday April 8th, in McCormick Place, Chicago, IL

Dr. Baldwin Called the meeting to order.

Members present: Dr. Baldwin, Dr. McCormick, Dr. Traynelis, Dr. Branch, Dr. Haid, Dr. Papadopoulos, Dr. Heary, Dr. Fessler, Dr. Lauryssen, Dr. Gokaslan, Dr. Levi, Dr. Benzel, Dr. Alexander, Dr. Gerszten, Dr. Midha, Dr. McLaughlin, Dr. DiRisio, Dr. Resnick, Dr. Kim, Dr. Shaffrey, Dr. Apfelbaum, Dr. Guest, Dr. Paramore, Dr. Choudhri.

Guests included: Mr. Ron Engelbreit, Ms Lori Behncke, Dr. Phil Weinstein and Mr. Noel Perrin.

The minutes from the previous meeting were distributed to the members present. Dr. Benzel made the motion and Dr. Alexander seconded it that the minutes be accepted, this was approved unanimously.

In the absence of Dr. Rodts, Mr. Engelbreit, from the AANS central office presented the treasurers interim report. This information was not available in printed form for the entire group, but was summarized by Mr. Engelbreit. The overall assets of the Section appear to be stable. The long term investment pool had a return that out paced the market. The total assets of the section are currently approximately, 1.4 million dollars.

Dr. Baldwin presented the questions regarding prospective budgeting to the Executive Committee for their consideration. At this time the President, President Elect, Secretary, Treasurer, or Meeting Chairman will have the authority to approve expenditures or budgetary changes in physical year 2003. After some discussion the dues for physical year 2003 will remain the same at \$50.00 per year. The Section will conduct a electronic membership drive. The fellowships or grants will remain the same. We anticipate completely funding the fellowships with solicited donations. The Section will continue to distribute information through its news letters. We will also run ads in the Journal of Neurosurgery and Neurosurgery.

There was an indication that the journal Neurosurgery had committed to provide complementary advertizing space for the section. At our annual meeting in 2003 we anticipated soliciting sponsorship or exhibit space sales to pharmaceutical companies in addition to the instrument manufacturers. The rate increases for the registration or exhibitors has already been developed through the AANS office.

Dr. Benzel reported on the Decade of the Spine and World Spine II. The budget is being prepared. There is a verbal commitment to share the risk on an even participation with the North American Spine Society. Some concern was expressed that there's not written documentation reflecting this agreement, and this will be secured by Dr. Benzel and Dr. Baldwin.

Dr. Baldwin solicited suggestions regarding a response to the SPORT Study. Early indications were that there was a mixed feeling about generating an alternative study. A recent publication of the Volvo Award Paper in the Journal of Spine seemed to indicate that surgical treatment was favored in a similar study in Europe. There's still an apparent desire from the parent organizations that a study that more accurately reflects patient selection and treatment groups be conducted by the Joint Section. The Section agreed that we will continue to develop this effort. Jim Guest and Peter Gerszten were charged along with Dr. Baldwin to pursue this effort.

Dr. McCormick reported on the concerns regarding Spine Fellowships. He discussed the concerns raised at the Executive Committee Meeting in February with the leadership of the Senior Society. This resulted in a document published on the SNS web site that verified proposed changes to the fellowship criteria. This appeared to address the concern about a six month fellowship and review of fellowship applications by a committee that did not include spine representation and then intra-residency fellowships. Clarification on the web site published in March 2002 indicated that the norm for a spine fellowship would be twelve months with a six month fellowship being considered an exception. The review committee for fellowship would include two members from the Spine and Peripheral Nerve Section and therefore the Section leadership would have veto power for fellowships. Dr. Phil Winestein representing the SNS Council assured the Section the changes published in the guidelines would be made to the formal web site page. He also assured the section that concerns raised in February were reasonable and were heard by SNS leadership. There's still a concern regarding infolded

fellowships into residency training period. Further discussion led to a motion by Dr. Traynelis and was seconded by Dr. Gokaslan. The motion read that the Spine Section recommends that a fellow meet the requirements for the ABNS or the Canadian equivalent board eligibility at the time he or she begins a Spine Fellowship. This motion was anonymously passed and will be presented to the Senior Society by Dr. Baldwin. The Executive Committee expressed appreciation to the Council of the SNS regarding their sensitivity and willingness to except our recommendations regarding the Spine Fellowships.

The education committee of the Section was charged by Dr. Baldwin to enhance the case reporting documentation that will ultimately be used to assess Spine Fellowships, and to work with the American Board of Neurological Surgery in this area.

Dr. Traynelis reported on the publications committee's effort to continue a wide distribution of the spine trauma guidelines. He indicated that Spine Universe will produce a compact disc of the guidelines for distribution to non-neurosurgeons. There was some discussion regarding the sponsorship and ownership of the content. Since Spine Universe was commercial entity it was decided that doctor's, Traynelis, McCormick and Hadley will review the CD prior to distribution to insure there is no conflict of interest or loss of control with intellectual property.

Dr. Guest reporting from the research committee. He indicated that the grants submitted must meet the minimum criteria for review and that they are developing consensus guideline for spinal cord implantation. The proposed document regarding spinal cord implants will be forwarded to the secretary at least two weeks prior to the next Executive Committee for inclusion in the Agenda Book.

Dr. Alexander reported on the 2002 annual meeting. The final numbers are pending but it appears that there are between 435 and 440 medical attendees bringing the total attendees close to 1000. The evaluations indicate that the overall meeting was quite well received. The final expense and revenue data are not complete but it appears the meeting will be profitable. The 2003 meeting planing is under way with Dr. Resnick and Alexander visiting the Tampa/Settlebrook site. The program committee plans a similar format. The exhibit chairman, Dr. McLaughlin was not

present for his report. The education issues indicated that there will be a change in the format at the Congress Meeting with one plenary type session to increase the profile of spine issues in the evening. The content for this session will come from the Joint Section. Dr. Heary will insure that the content issues will be resolved with Joel McDonald.

Dr. Papadopoloulos reported on the future sites. The Sattlebrook location for 2003 in San Diego, Marriott for 2004 have been confirmed. A location in Phoenix for 2005 is still under evaluation. Some consideration for return to Disney a property in Florida in 2006.

Dr. DiRisio had nothing to report on the rules and regulations. Dr. Gokaslan reported on the co-ordinating committee and detailed the processes for advertising the research opportunities and awards in the various publications.

Dr. Fessler delivered the report for the Washington Committee, this is included in the Agenda Book, but he was unable to present this secondary to the plenary session responsibility. There were no questions or concerns from the Executive Committee regarding the published report in the agenda book.

New Business: Dr. Baldwin discussed a request for indorsement of a Brachial Plexus Course by Dr. Spinner. A collection of Spine and Peripheral Nerve Section faculty are participating in this activity. A motion was made by Dr. Apfelbaum to empower Dr. Baldwin to endorse this activity if its appropriate. This motion was unanimously approved. A discussion of the American College and the American Board of Spine Surgery was entertained. These were identified as boards or activities that were outside of the mainstream of organized Neurosurgery and ACGME or RRC perview. Further discussion indicated that our membership should recognize that the solicitations from these entities should reflect that they are outside the current perview of the ACGME, RRC and the American Board of Medical Specialties approval processes.

Dr. Apfelbaum presented a solicitation for membership in the Cervical Spine Research Society by Joint Section Members. He indicated that the instructional courses and activities of this society were meritorious and suggested that the Joint Section Members participate or apply for membership. There being no further business Dr. Baldwin adjourned the meeting.

Minutes submitted by:
Dr. Charles L. Branch, Jr./ Secretary
CLB/ mjl

SEP-12-02 09:30AM

FROM-AMERICAN ASSOC OF NEUROLOGICAL SURGEONS

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T-373 P 02

F-155



Association of
Neurological
Surgeons

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Rolling Meadows, IL 60008

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September 9, 2002

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Gerald Rodts, MD
Emory Healthcare/Neurosurgery
550 Peachtree Street, N.E., Suite 806
Atlanta, GA 30308-2247

Dear Doctor Rodts:

The enclosed financial statements for the AANS/CNS Section on Disorder of the Spine & Peripheral Nerves are for the Year Ended June 30, 2002, and comparative information for the Year Ended June 30, 2001. The AANS auditors have completed their fieldwork, but until their final report is presented, changes to Fiscal Year 2002 are a possibility.

I will attend the beginning of your Executive Committee Meeting, and will address any questions or comments regarding the year-end statements or the 2003 budget at that time.

The last document enclosed is the fourth quarter summary of your investment portfolio.

If you have any questions, please don't hesitate to contact me at 847-378-0509 or rwe@aans.org.

Sincerely,

Ronald W. Engelbrecht, CPA
Deputy Executive Director

Enclosures

Cc: Novan Baldwin, MD
Roberto Heros, MD
Stephen M. Papadopoulos, MD
Phil Wirth, MD
Arthur L. Day, MD
Paul J. Camarata, MD
Laura Varner

SEP-12-02 09:30AM FROM-AMERICAN ASSOC OF NEUROLOGICAL SURGEONS 8476926770

T-373 P 03 F-155

AANS/CNS Section on Disorders of the Spine
Statement of Financial Position
As of June 30, 2002

	<u>Current Year</u> <u>06/30/02</u>	<u>Prior Year</u> <u>06/30/01</u>
ASSETS		
Checking & Short Term Investments	\$498,513	\$393,423
Accounts Receivable, net of Allowance for Uncollectible Accounts	2,855	9,490
Prepaid Expenses	2,145	1,379
Long-Term Investment Pool, at Market	522,792	541,757
TOTAL ASSETS	<u>\$1,026,306</u>	<u>\$946,249</u>
LIABILITIES AND NET ASSETS		
Liabilities		
Deferred Dues	<u>28,725</u>	<u>28,900</u>
Total Liabilities	<u>\$28,725</u>	<u>\$28,900</u>
Net Assets		
Unrestricted	\$917,349	\$934,961
Net Revenue (Expense)	<u>80,232</u>	<u>(17,611)</u>
Total Net Assets	<u>\$997,581</u>	<u>\$917,349</u>
TOTAL LIABILITIES AND NET ASSETS	<u>\$1,026,306</u>	<u>\$946,249</u>

09/19/02 12:54pm

SEP-12-02 09:31AM

FROM AMERICAN ASSOC OF NEUROLOGICAL SURGEONS

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T-373 P 04

F-155

AANS/ICNS Section on Disorders of the Spine
Statement of Revenue and Expenses by Function
For the Twelve Months Ending June 30, 2002

	Fiscal 2002			Fiscal 2001			FY 2001 Actual
	YTD Actual	YTD Admin	YTD Total	YTD Actual	YTD Admin	YTD Total	
REVENUES							
Membership Dues							\$57,868
Registration Fees							243,830
Exhibitors Fees							175,085
Contributions/Sponsorships							69,500
Barquet Revenue							30,000
Miscellaneous Revenue							10,284
Contributions for Operating Expenses							\$586,567
TOTAL REVENUES & SUPPORT	\$539,871	\$121,984	\$661,855	\$488,415	\$98,153	\$586,567	
EXPENSES							
Audio Visual							\$35,496
Bank Fee							7,244
Conventions & Affiliations							25,000
Computer Programming & Supplies							611
Decorating							4,966
Entertainment							13,863
Equipment Costs							
Facility							163,245
Food & Beverage							151,500
Fellowships							782
Grants							
Freight & Shipping							2,197
Gifts & Gratuities							11,283
Honorary & Awards							3,231
Insurance							
Mailing & Advertising							1,103
Legal Services							1,289
Outside Labor							20,490
Office & Other Supplies							39,577
Photocopy							4,126
Postage & Distribution							1,106
Printing/Typing							3,082
Professional Services							8,123
Security							7,429
Signs							3,336
Speaker Expenses							5,267
Staff Travel							
Telephone							1,409
Temporary Personnel							5,344
Tours & Transportation							90,402
Volunteer Travel							425
Unallocated Accounts							\$615,915
Staff Coordination							
Miscellaneous							
TOTAL EXPENSES	\$573,870	\$198,195	\$772,065	\$588,813	\$221,104	\$809,917	
Investment Earnings							11,736
NET REVENUE	\$166,001	(11,186)	\$154,815	\$99,602	(117,211)	(17,609)	(17,609)

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T-373 P 05 F-155

AANS/CNS Section on Disorders of the Spine
For the Twelve Months Ending June 30, 2002
Annual Meeting

	JUN Year-to-Date	Annual FY2002 Budget	Annual FY2003 Budget	JUN FY2001 Year-to-Date	FY 2001 Final
REVENUES					
Registration Fees	\$229,495	\$189,740	\$238,825	\$243,830	\$243,830
Exhibitors Fees	222,000	221,925	215,250	175,085	175,085
Contributions/Sponsorships	81,000	78,000	75,000	69,500	88,500
Banquet Revenue	7,240	7,925	20,020		
Miscellaneous Revenue	138				
TOTAL REVENUES & SUPPORT	\$539,871	\$494,890	\$547,095	\$488,415	\$488,415
EXPENSES					
Audio Visual	\$35,816	\$49,010	\$42,850	\$36,262	\$35,262
Bank Fee	5,780	6,000	5,800	1,500	1,500
Computer Programming & Supplies	83	1,000	200	811	611
Decorating	5,576	7,708	9,308	4,892	4,892
Entertainment	12,180	2,500	25,235	13,883	13,883
Equipment Costs		700	250		
Facility	8,395	11,690	6,963		
Food & Beverage	153,731	156,340	165,750	161,618	181,613
Freight & Shipping	1,399	2,500	1,200	782	782
Gifts & Gratuities	1,418	2,700	2,150		
Honoraria & Awards	1,094	1,040	1,445	3,187	3,187
Insurance	3,625	1,600	4,000		
Marketing & Advertising	851	1,000	600	6,665	6,665
Outside Labor	1,624	1,480	2,100		
Office & other Supplies	350	2,100	800	500	500
Photocopy	963	800	1,800	320	329
Postage & Distribution	8,817	17,900	15,054	15,516	16,516
Printing/Typesetting	33,483	27,359	43,147	39,186	39,185
Professional Services	1,685	875	3,200	2,371	2,371
Security	1,898	2,150	1,875	1,106	1,106
Signs	1,968	2,438	2,250	3,082	3,082
Speaker Expenses	175	3,500	1,000	8,123	8,123
Staff Travel	6,049	7,526	8,150	7,429	7,429
Telephone	3,233	5,250	7,700	2,865	2,865
Temporary Personnel	3,393	5,975	4,075	5,267	6,267
Tours & Transportation	1,913	1,800	420		
Volunteer Travel	890	800	600	1,409	1,409
Staff Coordination	76,706	71,597	72,789	71,789	71,789
Miscellaneous				295	295
TOTAL EXPENSES	\$373,870	\$395,826	\$431,083	\$388,684	\$388,684
NET REVENUE	\$166,001	\$98,865	\$116,012	\$99,731	\$99,731

SEP-12-02 09:31AM

FROM-AMERICAN ASSOC OF NEUROLOGICAL SURGEONS

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T-373 P 06

F-155

AANS/CNS Section on Disorders of the Spine
For the Twelve Months Ending June 30, 2002
General & Administrative

	JUN Year-to-Date	Annual FY2002 Budget	Annual FY2003 Budget	JUN FY2001 Year-to-Date	FY 2001 Final
REVENUES					
Membership Dues	\$50,775	\$80,925	\$55,500	\$57,863	\$57,868
Contributions/Sponsorships	65,000	30,000	30,000		
Miscellaneous Revenue				30,000	30,000
Contributions for Operating Expenses	7,819	8,106	9,695	10,284	10,284
TOTAL REVENUES & SUPPORT	\$123,594	\$99,031	\$95,195	\$98,152	\$98,152
EXPENSES					
Audio Visual	\$1,604		\$500	\$234	\$234
Bank Fee	772	600	315	5,744	5,744
Contributions & Affiliations	25,000	25,000	25,000	25,000	25,000
Decorating	191			73	73
Facility	100				
Food & Beverage	2,342	1,800	2,000	1,629	1,629
Fellowships	75,000	75,000	75,000		
Grants	12,289			153,500	153,500
Marketing & Advertising	1,510	7,152	5,000	4,588	4,588
Legal Services				3,231	3,231
Office & other Supplies	185	800	400	603	603
Photocopy	974	805	500	960	960
Postage & Distribution	10,178	650	3,000	4,974	4,974
Printing/Typesetting	42,239	500		352	352
Professional Services	15,440	4,000		1,755	1,755
Signs	76				
Telephone	137	200	500	471	471
Uncollectable Accounts				5,344	5,344
Staff Coordination	10,060	8,106	11,087	18,613	18,613
Miscellaneous				130	130
TOTAL EXPENSES	\$188,197	\$124,413	\$124,382	\$227,231	\$227,231
Investment Earnings	(11,165)	25,000	28,500	11,736	11,736
NET REVENUE	(\$55,771)	\$818	\$313	(\$117,343)	(\$117,343)

SEP-12-02 09:31AM

FROM-AMERICAN ASSOC OF NEUROLOGICAL SURGEONS

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T-373 P.07

F-155

AANS/CNS SECTION ON DISORDERS OF THE SPINE**NOTES TO FINANCIAL STATEMENTS**

June 30, 2002

Annual Meeting**Annual Meeting Revenue – Budgeted \$494,590, Actual \$539,871**

Attendance revenue is \$45,200 better than budget

Audio Visual – Budgeted \$49,010, Actual \$35,816

Audio Visual are lower due to a large credit that was issued from the vendor due to problems that were experienced at the meeting and adjustments to courses, which required less equipment

Entertainment – Budgeted \$2,500, Actual \$12,180

Entertainment expense consists of costs associated with the chairman's dinner, golf fees and tennis fees.

Facility – Budgeted \$11,690, Actual \$8,395

Expenses related to rental of the facility space at the Disney property were less than anticipated.

Insurance – Budgeted \$1,600, Actual \$3,625

Insurance for the Annual Meeting exceeded budget due to the sharp increase in rates since the September 11 events.

Photocopy – Budgeted \$600, Actual \$963

Unanticipated expense for copying of forms and other materials related to the meeting

Postage & Distribution – Budgeted \$17,900, Actual \$9,817

Postage was reduced with the substitution of electronic mailing for speaker letters and abstracts along with a postcard mailing to a large number of members instead of a full mailing of information.

Printing/Typesetting – Budgeted \$27,359, Actual \$33,483

Printing expenses were significantly lower since the number of preliminary programs were reduced since they were not mailed to everyone, instead, a postcard was mailed and if the member was interested in receiving a preliminary program, they could have requested one.

Professional Services – Budgeted \$875, Actual \$1,685

Expenses for processing of the evaluation forms and costs for Joint Sponsorship of the meeting.

Telephone – Budgeted \$5,250, Actual \$3,233

Actual costs for telephone expense is lower due to fewer conference calls required.

Temporary Personnel – Budgeted \$5,975, Actual \$3,393

Temporary personnel time was not required as anticipated.

SEP-12-02 08:32AM FROM-AMERICAN ASSOC OF NEUROLOGICAL SURGEONS 0476826770

T-373 P.08 F-155

Membership Dues – Budgeted \$60,925, Actual \$50,775

Membership dues is lower than expected due to the write off's of old dues receivable from fiscal years 1999, 2000 and 2001 and members who discontinued membership in fiscal year 2002.

Contributions & Sponsorships – Budgeted \$30,000, Actual \$65,000

Of the \$65,000 is \$35,000 that was raised to offset the costs for printing the Guidelines.

Audio Visual – Budgeted \$0, Actual \$1,604

Audio Visual costs that were incurred at the CNS and AANS meetings for audio visual equipment and labor costs.

Decorating – Budgeted \$0, Actual \$191

Cost to decorate Joint Section booth at AANS Annual Meeting, Total cost is allocated evenly to each of the Joint Sections.

Food & Beverage – Budgeted \$1,800, Actual \$2,342

Food & Beverage costs consist of committee meetings from the CNS and AANS meetings and Peripheral Nerve Task Force meeting at the AANS meeting.

Grants – Budgeted \$0, Actual \$12,289

Costs incurred for publishing grants/fellowships announcements in the *Journal of Neurosurgery* and *Neurosurgery*.

Postage & Distribution – Budgeted \$650, Actual \$10,178

Cost incurred to mail dues invoices, monthly statements and other administrative related materials. In addition, \$7,252 was for mailing the Guidelines.

Printing/Typesetting – Budgeted \$500, Actual \$42,239

Expenses incurred for letterhead and printing of the Guidelines which cost \$41,909.

Professional Services – Budgeted \$4,000, Actual \$15,440

Costs associated with copyediting the Guidelines and posting the Guidelines online.

SEP-12-02 09:32AM

FROM AMERICAN ASSOC OF NEUROLOGICAL SURGEONS

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T-373 P 00

P-155

The American Association of Neurological Surgeons
Investment Performance Review

AANS/CNS Section on Disorders of the Spine & Peripheral Nerves

AANS Investments	2nd Qtr		Fiscal 02		Inception	
	4/1 - 6/30/02	4/1 - 6/30/02 Benchmark	7/1/01 - 6/30/02	7/1/01 - 6/30/02 Benchmark	thru 6/30/02	thru 6/30/02 Benchmark
Wishare Target (Wishare 5000 Benchmark)	-11.82%	-12.61%	-14.39%	-16.62%	-23.20%	-31.40%
EAFE Target (EAFE Growth Index Benchmark)	-5.25%	-2.12%	-8.00%	-9.49%	-30.02%	-34.70%
Pimco TotalReturn Fund A (Lehman Brothers Aggregate)	3.21%	3.69%	7.39%	8.63%	23.29%	24.56%
Total Portfolio	-5.55%	-5.14%	-3.22%	-5.87%	-2.90%	-9.31%

Please note that past performance does not guarantee future results. The information contained herein is based on sources we believe to be reliable, but its accuracy is not guaranteed. ParnetWebster Incorporated is not engaged in rendering legal, accounting or other professional services.

SEP-12-02 09:32AM

FROM-AMERICAN ASSOC OF NEUROLOGICAL SURGEONS

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T-373 P 10

P-155

DISORDERS OF THE SPINE LONG TERM INVESTMENTS

Asset Allocation as of June 30, 2002

Index	Large Cap Domestic	Mid Cap Domestic	Small Cap Domestic	Int'l Equ.	Fixed Income	Total	Percent
S&P 500	\$ 156,159					\$ 156,159	30%
Mid Cap 400		\$ 84,177				\$ 84,177	16%
Liberty Acorn			\$ 21,914			\$ 21,914	4%
Ing Int'l				\$ 43,818		\$ 43,818	8%
Pimco					\$ 214,046	\$ 214,046	41%
Total Long Term Investments	\$ 156,159	\$ 84,177	\$ 21,914	\$ 43,818	\$ 214,046	\$ 520,114	100%
Money Market						<u>\$ 3,365</u> <u>\$ 523,479</u>	

<u>Section</u>	<u>3/31/2002 Balance</u>	<u>Gain (Loss)</u>	<u>6/30/2002 Balance</u>
Spine	\$ 554,981	\$ (31,482)	\$ 523,479