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## The legacy of GIVE: Pay it forward



Dr. Aziz (front row center) and GIVE team.

Dr. Shahid Aziz's Smile Bangladesh team marked its 25th visit to Bangladesh in March 2019. The 10-day journey has become a fixture on Dr. Aziz's calendar and a coveted opportunity for OMS residents eager to learn cleft lip and palate repair techniques from a master.

The travel is grueling and the surgery schedule packed, but humanitarian healthcare has been embedded in Dr. Aziz's worldview for most of his adult life. The son of a doctor/clinical researcher, Dr. Aziz learned from his father the importance of giving back to the world and credits AAOMS Life Fellow Dr. Steven Roser's example for his success as a leader of international humanitarian healthcare teams.

Dr. Aziz first visited his father's homeland of Bangladesh in 2006, where he served on a floating hospital that visited the country's poorest and most remote communities.

"There's a great need for cleft surgery in Bangladesh," Dr. Aziz said.

"Our team of two surgeons performed 40 cleft surgeries in three days."

The team christened its project Smile Bangladesh and resolved to return each year, gradually expanding the mission to include education of local surgeons. Dr. Aziz and fellow OMS

we hope this experience inspires the next generation to give back, even if it's volunteering once a month at their local clinic."

Dr. Bruno Kuloba, a graduate of Meharry Medical College School of Dentistry serving as an OMS in the U.S. Navy, received a \$2,500 Global Initiative for Volunteerism and Education (GIVE) stipend from the OMS Foundation to serve with Smile Bangladesh in March 2019. Already a seasoned volunteer with Jamaica Awareness Association of California, Dr. Kuloba understood the value of a skilled set of hands paired with a generous heart.

"We could read the gratitude in the parents' faces postop – with the stigma of the cleft deformity gone, their child's life was forever changed," Dr. Kuloba said.

Dr. Kuloba credits GIVE with helping to crystallize his ambitions.

"This experience touched my heart and broadened my horizons," he said. "I'm thankful for the clinical training I received, and I'm already looking for more. From there, it was a logical decision to become a Foundation donor. I want to help make opportunities like this available to others." ■



With the stigma of the cleft deformity gone, their child's life was forever changed.

Dr. Jose Marchena are the core of a team that also includes OMSs, plastic surgeons, anesthesiologists and two or three residents per trip.

"We've always included residents," Dr. Aziz said. "Aside from the training,

### INSIDE THIS ISSUE

**From the Chair:**  
Expand your giving options

**Featured Donors:** Treloar & Heisel, OMSNIC agents, Dr. and Mrs. Dan Klemmedson, Drs. Brett Ferguson and Rita Burnett

**OMSs need research,**  
now more than ever

**Something for now,**  
something for later

**2020 Foundation**  
awards announced

**Alliance News**

H



William C. Passolt, CPA  
Chair, OMS Foundation

The late Dr. Robert V. Walker is widely recognized as a giant in the OMS specialty. Trained at Parkland Hospital, he developed one of the top training programs in the country while leading the Division of Oral and Maxillofacial Surgery at the University of Texas Southwestern Medical Center. Dr. Walker loved teaching interns and residents and became a mentor and a hero to generations of oral and maxillofacial surgeons.

In 1997, the OMS Foundation named its new planned giving society for Dr. Walker, honoring

## Legacy giving expands donors' options

his passion for research and education by creating a vehicle to support them in perpetuity.

Donors who commit to a planned gift of \$25,000 or more to the Foundation are recognized with membership in the R.V. Walker Society. Nearly 400 donors are listed on the Foundation's Walker Society webpage, including residents, retirees and everything in between. They are united in their resolve to ensure the research and education opportunities that contributed to their success are available for the next generation. Is your name among them?

Living through a pandemic has caused me to reflect more than once on what's truly important, and I've used this time to check some items off my personal to-do list. If updating your estate plan has been on your list, I encourage you to consider making it a priority.

**Legacy giving through the Walker Society allows donors to make a significant – even transformational – gift with minimal or no impact on their annual cash flow.**

Among the simplest options are a gift to the Foundation in your will (or in a codicil amending an existing will). Allocating even 5 percent of your residual estate to the Foundation is an eloquent final “thank you” to the specialty. Or consider naming the Foundation as owner and beneficiary of a new or existing life insurance policy. Recently, Treloar & Heisel introduced a whole life insurance policy naming the Foundation as owner and beneficiary. With values ranging from \$25,000 to \$100,000, these policies offer an attractively priced gateway to Walker Society membership for early- and mid-career OMSs, for whom life insurance is often less expensive.

The Planned Giving Primer found on the Foundation's Walker Society webpage provides an overview of the most common planned giving options. Your legal and financial advisors are your best resource for identifying your best option. Contact Mary DiCarlo, the Foundation's Associate Executive Director for Development, with questions or to notify the Foundation of your decision. Then watch for your invitation to the Foundation's exclusive R.V. Walker Donor Recognition Reception at the AAOMS Annual Meeting.

Legacy giving is not just for the old or the wealthy. When combined with annual giving, it enables strategic donors to support the Foundation's work both now and later, ensuring (as Dr. Walker wished) that their life's work will not perish.

Thank you! ■



Back row from left:  
Scott Farrell, MBA, CPA  
Dale J. Misiek, DMD  
Brett L. Ferguson, DDS, FACS  
A. Thomas Indresano, DMD, FACS  
Douglas W. Fain, DDS, MD, FACS  
J. David Morrison, DMD  
W. Frederick Stephens, DDS  
Thomas P. Williams, DDS, MD, FACS

Front row from left:  
Louis K. Rafetto, DMD  
William C. Passolt, CPA  
Robert S. Clark, DMD

### 2020 OMS Foundation Board of Directors

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J. David Morrison, DMD  
W. Frederick Stephens, DDS  
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*ROAAOMS Liaison*  
Scott Farrell, MBA, CPA, *Executive Director*

### Contact us

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OMSFoundation.org  
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## OMSNIC agents give back again and again

It is said necessity is the mother of invention. In the mid-1980s, with the cost of OMS malpractice insurance spiraling upward, necessity gave birth to one of the specialty's most successful companies: the AAOMS Mutual Insurance Company, capitalized initially by AAOMS and now known as OMSNIC.

In the 30-plus years since, the relationship between AAOMS and OMSNIC has continued to flourish. Wholly owned and operated by insured OMSs, OMSNIC insures about 85 percent of eligible AAOMS members. Throughout its history, OMSNIC has made it a point to give back to the specialty, often by supporting the OMS Foundation. The company was the largest donor to the Foundation's Centennial Tree campaign with a \$100,000 gift-match partnership in 2018, and OMSNIC offers consistent support to the Foundation Alliance's programs for residents.

Behind the scenes, though, is a wellspring of quiet generosity that has helped sustain the Foundation for nearly 30 years: OMSNIC's national team of independent insurance agents. In 1992, after he was approached for an individual contribution to the Foundation's Professional Excellence in Education and Research (PEER) campaign, Florida agent Ron Backer enlisted his fellow agents in a pledge to collectively contribute \$10,000 per year for five years to the Foundation. Their contributions ultimately exceeded their goal.

A few years later, they contributed more than \$10,000 to the Foundation's Library Fund. A second five-year pledge raised more than \$50,000 for the Foundation's capital campaign that ended in

2008; a third pledge, now in its fifth year, is on target to meet or exceed its \$50,000 goal.

All told, OMSNIC agents have donated more than \$175,000 to the Foundation.

Mr. Backer, an OMSNIC agent since 1988, credits his colleagues' solidarity – with each other and AAOMS – for this extraordinary accomplishment.

"We agents took great pride in making sure that OMSNIC was successful," he said. "We developed close relationships with our OMS clients and with each other. For every commitment we made to the Foundation, we knew we could count on full participation from our agents.

"OMSs are our favorite clients. Their dedication to their patients and their specialty is inspiring, and it's a privilege to support their efforts through our support of their Foundation." ■

**OMSNIC**  
DEFENDING THE SPECIALTY

## Alliance preparing to pivot to virtual outreach and fundraising

The Alliance Committee is working to integrate digital platforms into its signature hospitality, mentorship and fundraising programs to ensure that its mission remains viable even in a pandemic. Learn how the Alliance is evolving at [OMSFoundation.org/Alliance](https://OMSFoundation.org/Alliance) and sign up for the Alliance digital newsletter to receive event and program updates. ■

## Observing a 'compassionate pause'

In deference to the financial impact of the COVID-19 pandemic on the OMS specialty, the Foundation has implemented a "compassionate pause" in its 2020 fundraising campaign. The Foundation Board extends its sincere thanks to the volunteers, donors and champions who have helped to sustain its mission and programs during this difficult time. Special thanks to the OMSFIRE and other recurring donors whose contributions have not wavered. Your steadfast support is deeply appreciated. ■

### DID YOU KNOW?

The OMS Foundation Alliance welcomes **every spouse/family member** of OMS Foundation donors into its vibrant community with no membership fee. Learn more at [OMSFoundation.org/Alliance](https://OMSFoundation.org/Alliance).



# 2020 Foundation awards for research, education announced

The OMS Foundation Board of Directors approved an array of programs for funding in 2020. These include:

- Four Research Support Grants (\$75,000 each) awarded to:
  - University of Texas Southwestern Medical Center for “Magnetic resonance neurography and diffusion tensor imaging of peripheral trigeminal nerve injuries: Surgical correlation and outcomes prediction” (Stephen B. Milam Research Award recipient)
    - Principal investigator: Avneesh Chhabra, MD
    - Co-principal investigator: John R. Zuniga, DMD, MS, PhD
  - University of Toronto for “The Oral and Maxillofacial Objective Structured Assessment of Technical Skills (OMOSATS)”
    - Principal investigator: Marco Caminiti, DDS, MEd, FRCD
    - Co-principal investigator: Mark Shuren, DDS, FRCD
- University of Texas Health Science Center at Houston for “Development of surgically implantable minor salivary gland-based constructs for treatment of Xerostomia”
  - Principal Investigator: Mary (Cindy) Farach-Carson, PhD
  - Co-principal investigator: Simon Young, DDS, MD, PhD
- University of North Carolina School of Dentistry for “Orthognathic speech pathology”
  - Principal investigator: Laura Anne Jacox, DMD, MS, PhD
  - Co-principal investigators: Tim Turvey, DDS, FACS; and George Blakey, DDS
- Continued support of Surgical Council on Resident Education (SCORE) – \$20,000 for 2019-21
- Support of 2020 Clinical Trials Methods Course – \$30,000
- Support of 2020 Resident Transitions into Practice Conference – \$5,000
- Support of Principles of Head and Neck Oncology for the OMS – \$5,000
- Nine Norma L. Kelly Resident Spouse Scholarships – \$9,000
- 10 Global Initiative for Volunteerism and Education (GIVE) stipends – \$25,000

Read more about this year’s Research Support Grant awards at [OMSFoundation.org/About/News](https://OMSFoundation.org/About/News).

This year’s research projects, temporarily halted by the COVID-19 pandemic, have received one-year deadline extensions for completion.



## Featured Donors: Dr. Daniel and Adaline Klemmedson



### Gold OMSFIRE Donors R.V. Walker Society members

“Adaline and I understand that the reputation of oral and maxillofacial surgery is due to the work of those who came before us. They created opportunities that all of us have benefitted from. Our donations to the OMS Foundation serve to support research and education necessary to raise the bar of our profession and ensure success to those who follow us. Please join us if you feel the same.”

## Mark your Calendar

Ongoing: GIVE applications accepted



Smile Bangladesh, March 2019



Dr. Brent Ward, Chair,  
OMS Foundation  
Committee on Research

## OMSs need research, now more than ever

A recent experience in the operating room helped shape my go-to answer for a question I'm frequently asked: "Why should I, as an OMS, invest in research?"

During a procedure when the pathologist had to make a "close call" assessment, I was able to provide assurance that our decision was supported by data from an IRB-approved research study of 30 patients undergoing the exact same protocol.

I also explained that by combining information from that study with our studies on depth of invasion, we had spared numerous patients from unnecessary neck dissection. Furthermore, the chances for under-treatment (requiring a second trip to the operating room) were very small. Armed with that knowledge, we proceeded with precision and confidence in our decision.

Like you, research regularly impacts my daily practice and benefits my patients by optimizing the safety and efficiency of the care I deliver. Whether you have conducted the research yourself or learned from the work of another is not important. As OMSs, we count on the expertise of researchers to provide us with tested and verified solutions to an array of questions.

Our specialty must invest in research and discovery in order to stay relevant. We need to

continually advance in every aspect of our field, and we need reliable data to support our best practices in a rapidly evolving professional and regulatory landscape.

The OMS Foundation Committee on Research is charged with evaluating every qualified grant proposal and transmitting a set of recommendations to the Board. We rate each proposal for the robustness of the science but also for the relevance and significance of the scientific question to our profession. Some of our most pressing needs are in areas in which all of us practice, such as office-based anesthesia. The committee gives significant consideration to proposals that address these shared areas of interest because they have the potential to impact the entire specialty.

We expect the Foundation's new Clinical Research Support Grant and its Anesthesia and Patient Safety Study, with their focus on outcomes-oriented research, to provide much-needed evidence to support the care we all deliver.

There is no question now is the time for all of us to invest in the future of our specialty by supporting research and discovery. The challenges we face are far too urgent to justify delay. ■

## 'Something for now, something for later'

"Whatever you do, always give back" was a life lesson Dr. Brett L. Ferguson learned from his father.

"My dad was a postal worker who always gave to the church," Dr. Ferguson said. "He expected a lot of me, and when I'd found my life's path, he made it clear that there was still more for me to do."

Dr. Ferguson recalls his quandary as a mid-career academic OMS, juggling requests for donations from multiple alma maters.

"Naturally, I wanted to give to all of them - they had helped shape and advance my career," he said. "And I wanted to support the OMS Foundation too. But I didn't have that kind of money to give away. A financially savvy buddy of mine suggested that I collectively list those organizations as beneficiaries on a life insurance policy. It was easy, inexpensive and tax-deductible, and suddenly I was a philanthropist."

Dr. Ferguson went on to serve as an officer of AAOMS and the Association's President in 2017-18. He serves as Chair of the

Department of Oral and Maxillofacial Surgery and Hospital Dentistry at the University of Missouri-Kansas City and is a Director of the OMS Foundation. Still, he believes, there is more to do.

"Leaders have an obligation to ensure there's a pathway to success for the next generation, so my wife, Rita, and I have diversified our giving strategy to include 'something for now and something for later,'" he said. "As recurring donors to the Foundation's Annual Fund, we get to see our giving bear fruit in our lifetimes, and our R.V. Walker Society commitment will support research and education after we're gone. None of this was complicated; the hardest part was getting around to it. But it sure feels good to give back when life has given us so much." ■



Drs. Brett Ferguson and Rita Burnett

# Featured corporate donor: Treloar & Heisel



From left: Treloar & Heisel CEO Scott Fehrs and COO Ken Thomalla

In December 2019, Treloar & Heisel announced a \$100,000 five-year pledge to the OMS Foundation, becoming the first corporate donor to the Foundation's new OMSFIRE campaign. The commitment continues a history of generous support for the Foundation, totaling nearly \$270,000 that includes multiple major gifts, a gift-match challenge partnership in 2018 and introduction of a customized life insurance program linked to the Foundation's R.V. Walker legacy giving society in 2019.

Get questions answered about Treloar & Heisel's new life insurance policies benefiting the OMS Foundation by calling 800-852-4900.



## We are stronger together

“At OMSA, we strive to provide our patients with the highest level of care available. Investing in research and education is how we’ll keep our practice on the cutting edge. Supporting the OMS Foundation amounts to an investment in our future.”

From left to right – *Steven R. Schimmele, DDS, FACS; J. Terrence O’Neill, DDS; Lucas S. Reed, DDS; Jean Bradley, ANP-C; Steven J. Butler, DDS; Ryan M. Diepenbrock, DDS, FACS; and Michael J. Stroncsek, DDS, MS*  
**Oral and Maxillofacial Surgery Associates (OMSA) “The Oral Surgery Group”**



THANK YOU to the volunteers, donors and champions whose continued support sustains the OMS Foundation’s mission during these difficult times. Your gift to the Foundation supports innovative research, education opportunities for residents and a strong academic sector.



[OMSFoundation.org/Donate](https://OMSFoundation.org/Donate)

Investing in innovation.  
Advancing the specialty.



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