

2017 ANNUAL REPORT



INVEST in the future
EVOLVE patient care
ADVANCE the specialty



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2017 ORAL AND MAXILLOFACIAL SURGERY FOUNDATION BOARD OF DIRECTORS (POST-STRATEGIC ALLIANCE)

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Strategic Alliance positions OMS Foundation for success

2017 will be remembered as a transformational year for the OMS Foundation. The approval in October of a carefully crafted Strategic Alliance with AAOMS ushered in significant changes to the Board and organizational infrastructure, but the Foundation's commitment to improving patient outcomes through research, education and academic excellence remained rock-solid.

Guided by the Strategic Alliance, staff and committee responsibilities were refined to minimize redundancies and streamline operations. The addition of a development director provided structure and vision to our fundraising goals and processes, with donor recognition and stewardship topping the list of priorities. Our fundraising for the year benefited from the steadfast support of our annual and monthly donors and Major Gift contributors, buoyed by a successful year-end appeal. Thank-you calls made by Foundation Board members are a key element in our crusade to retain existing donors, re-engage lapsed donors and enlist new donors to help shape the future of our specialty.

The Foundation in 2017 made significant contributions to the advancement of the OMS specialty, approving \$657,500 to fund research

and education programs. Our current programs portfolio promotes excellence across a broad spectrum of the OMS specialty, serving residents, practitioners, researchers and faculty. As our resources continue to grow, so will our portfolio.

It is our mandate to ensure the next generation of OMSs has access to cutting-edge science and technology, tested and proven by world-class researchers, plus the educational opportunities required to translate high-tech research into practical applications. Nothing less is acceptable, and we have set our sights high for AAOMS's centennial year.

At the top of our to-do list for 2018 is a new strategic plan to frame the priorities, goals and success metrics of the Foundation and set us on a steady upward trajectory. Our Board is energized, focused and dedicated to making AAOMS's centennial a milestone year for the Foundation as well, with AAOMS fully committed to supporting our success.

We have laid the groundwork for a breakthrough year for the Foundation in 2018, and we're committed to ensuring that robust funding for research and education is a defining



Kathy A. Banks, DMD

attribute of AAOMS's next century. Your support is critical to our success and to the viability of our specialty in the 21st century. Thank you for joining us in this important work!

Kathy A. Banks, DMD

KATHY A. BANKS, DMD
Chair, OMS Foundation

Financials

2017

| ASSETS | | |
|--|-----------|-------------------|
| Cash | \$ | 172,892 |
| Investments | | 14,104,002 |
| Contributions receivable | | 622,057 |
| Cash surrender value of life insurance | | 93,898 |
| Other assets – Deposits | | 660 |
| Total assets | \$ | 14,993,509 |

| LIABILITIES & NET ASSETS | | |
|---|-----------|-------------------|
| Liabilities | | |
| Accounts Payable | \$ | 338,811 |
| Grants Payable | | 757,500 |
| Total liabilities | \$ | 1,096,311 |
| Net Assets | | |
| Unrestricted | \$ | (215,692) |
| Temporarily Restricted | | 7,594,194 |
| Restricted | | 6,518,696 |
| Total net assets | \$ | 13,897,198 |
| Total liabilities & net assets | \$ | 14,993,509 |

2017 TOTAL REVENUE



- Contributions
- Supporters
- Interest & Dividends
- Realized and unrealized gains (losses) on investments

2017 EXPENSE ALLOCATION



- Programs
- Fundraising
- General & Administrative

Research and Education Funding

The OMS Foundation Board of Directors approved \$657,500 to fund OMS-specific research and education. Funded programs include:

- \$225,000 – Three Research Support Grants
- \$390,000 – Support of Faculty Educator Development Awards (FEDA)
- \$12,500 – One Student Research Training Award*
- \$15,000 – Support of 2018 AAOMS Clinical Trials Methods Course*
- \$10,000 – Resident Travel Scholarships to attend the 2018 AAOMS Clinical Trials Methods Course*
- \$5,000 – Support of the 2018 Resident Transitions into Practice Conference*

2017 STUDENT RESEARCH TRAINING AWARD

These awards support student projects with the aim to attract qualified students to the OMS specialty and investigative research. Each award is \$12,500 per institution.

- Dr. Steven Wang, Program Director
University of Pennsylvania
School of Dental Medicine

2017 RESEARCH SUPPORT GRANTS

Research Support Grants further the development of scientific investigators committed to problems related to oral and maxillofacial surgery. Each grant is \$75,000.

- Research Support Grant – Stephen B. Milam Research Award – University of Pennsylvania (Stephen B. Milam Research Award goes to the grant scored the highest by the OMS Foundation Committee on Research.)

Application of Neural Progenitor-like Cells Induced from Gingiva-derived Mesenchymal Stem Cells in Facial Nerve Regeneration in Rats.

PI: Rabie Shanti, DMD, MD
Co-PI: Qunzhou Zhang, PhD

- Research Support Grant – East Carolina University
Investigation of Anatomical Changes Associated with the Use of a Pedicled Buccal Fat Pad Graft Used During Primary Palatoplasty.

PI: Jamie Perry, PhD
Co-PI: Michael S. Jaskolka,
DDS, FACS, MD

- Research Support Grant – University of Texas Health Science Center at Houston
Exploring Mechanisms to Improve STINGel Immunotherapy in Head and Neck Cancer.

PI: Simon Young, DDS, MD, PhD
Co-PI: Jeffery Hartgerink, PhD

*Funded in part by the Foundation Alliance Committee.

Robert V. Walker Planned Giving Society

Leaving a Legacy Through Planned Giving

Established in 1997, the Robert V. Walker Planned Giving Society was created to secure the future of the OMS Foundation. Named in honor of Dr. Robert V. Walker, a luminary in the specialty, the Society recognizes individuals who have made a planned or estate gift. Dr. Walker was a former Foundation Chair and long-time advocate of the Foundation's mission.

Members

Robert V. Walker Society members have provided documentation for their planned gifts.

** Indicates the member is deceased.*

Platinum

(\$1,000,000+)

Dr. Gerald E. Hanson*
Dr. Bernard C. Pecaro

Gold

(\$250,000 – \$999,999)

Dr. T. Williams Evans
Drs. Eric D. and Nancy Ferrara
Dr. Daniel and Adaline Klemmedson

Silver

(\$75,000 – \$249,999)

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Dr. Peter H. Aschaffenburg*
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Dr. David E. and Rev. Claudia E. Frost
Dr. James M. and Angela Henderson
Dr. James R. and Carmen Hupp
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Dr. W. Mark and Dr. Tina Tucker

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(\$25,000 – \$74,999)

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Dr. and Mrs. Richard
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Dr. John R. Zuniga

Tribute Gifts

2017 Memorial Gifts

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In memory of Daniel Rooney

Dr. Stephen T. Connelly

*In memory of
Patrick G. Duffy*

Dr. Francis A. Connor

*In memory of Dr.
Philip L. Maloney*

Dr. Stephanie J. Drew

*In memory of Dr.
William H. Bell*

Dr. David E. Frost

*In memory of Mrs.
Arlene Pollan*

Dr. Ann M. Holzhauer

*In memory of David
W. Shelton*

National Society of Oral & Maxillofacial Surgeons

*In memory of Drs. John
Turner and Samuel O. Banks*

Dr. Richard W. Panek

*In memory of Drs. Jack S.
Litz and John L. Dolce*

Dr. Terry W. Slaughter

*In memory of Dr. Hugo
L. Obwegeser*

Dr. Herbert D. Stith

In memory of Jesse H. Stith

Dr. Steven Zambrano

*In memory of Benjamin
Zambrano*

2017 Honor Gifts

Dr. Sam E. Farish

*In honor of Dr.
Thomas B. Dodson*

Dr. David E. Frost

*In honor of Dr. Dale J.
and Mrs. Holly Misiek*

Dr. David E. Frost

*In honor of Dr. Vincent
J. Perciaccante*

Dr. David H. Hanson

*In honor of Dr.
Bernard C. Pecaro*

Dr. John J. Hillgen

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Dr. Ann M. Holzhauer

In honor of Dr. Edwin D. Joy

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Plevnia, DDS*

Dr. Michael Teague

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J. Perciaccante*

Dr. Lisa N. Tran

*In honor of Dr. Alan
L. Felsenfeld*

**“Giving is not just about making
a donation. It is about making
a difference.”**

—KATHY CALVIN

PRESIDENT AND CEO OF THE UNITED NATIONS FOUNDATION

Multi-year Pledges

The OMS Foundation extends sincere thanks to these generous donors who have committed to a gift of \$25,000 or \$50,000 payable over five years. *Indicates that a pledge has been fulfilled.

2015 Donors

Dr. Howard E. Fisher – \$50,000
Dr. A. Thomas Indresano –\$50,000*
Dr. Anthony M. Spina – \$50,000
Treloar & Heisel, Inc. – \$50,000
Mr. William C. Passolt – \$25,000

2016 Donors

OMSNIC Agents – \$50,000
Dr. Kathy A. Banks – \$25,000
Dr. Gary Bouloux – \$25,000
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Dr. Manolis G. Manolakakis – \$25,000
Dr. Victor L. Nannini – \$25,000
New Jersey Society of Oral and
Maxillofacial Surgeons – \$25,000
Dr. Vincent J. Perciaccante – \$25,000

2017 Donors

Oral Surgery Associates & Dental
Implant Centers – \$50,000

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- Dr. Brett C. Gray
- Dr. Robert E. Going
- Dr. Brenda J. Hall
- Dr. Fulton D. Lewis
- Dr. Steven P. King
- Dr. Steven D. Pollack
- Dr. Richard S. Singer

OMSNIC – Investing in the Success of the OMS Specialty

Independent OMSNIC agents made their first five-year pledge to the Foundation in 1991, contributing individually toward a collective goal of \$50,000. Five years later, OMSNIC agents from across the country had contributed nearly \$52,000 to the Foundation and the pledge was renewed, and later renewed again.

Entering its second year of the second five-year pledge, contributions

to the Foundation from OMSNIC agents totaled \$23,071 – a reflection of AAOMS members' loyalty to the OMSNIC brand and OMSNIC agents' commitment to serving their policyholders by supporting their Foundation. Several OMSNIC Directors have served as Foundation Directors (OMSNIC CEO and President Bill Passolt joined the Foundation Board in 2015).

Many others are listed among the Foundation's most generous donors and R.V. Walker Society members.

OMSNIC's steadfast support of the Foundation gives credence to a vision of a future in which the research that drives innovation is prized and supported by all – private practitioners, academics, researchers, residents, vendors, retirees and friends.

Annual Donors

Without the generosity of its annual donors, the OMS Foundation would be unable to serve the specialty. Their donations are enabling bright minds to pursue a career in academia and encouraging research that will keep the specialty strong and vibrant. Thanks to these donors for helping to ensure a brighter future for the OMS specialty.

Diamond Plus

(\$7,500+)

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Dr. Howard E. Fisher
Dr. A. Thomas Indresano
Dr. Daniel J. Klemmedson
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Mr. William C. Passolt
Dr. Anthony M. Spina
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(\$4,500 – \$7,499)

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Dr. Gary W. Seldomridge
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