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## 1990-91 Annual Report

# American Association Of Occupational Health Nurses

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*Leaders in Workplace Health and Safety*

# Executive Report

Occupational health nursing has progressed from a single dimension practice in a traditional industrial setting to a multi-dimensional discipline in worksites ranging from skyscrapers to ships to space.

The mission of the American Association of Occupational Health Nurses is to promote occupational health nursing, maintain its professional integrity and enhance its professional status.

AAOHN is a leader among associations in both the nursing and occupational health arenas. Our expertise and opinions are solicited by nursing colleagues, members of Congress and other government officials, professional societies and management.

The leaders of AAOHN follow a clearly defined plan which outlines goals and implementation strategies for four program areas. This year, we have set the objectives necessary to meet the goals established in the Five-Year Strategic Plan. As you review the year's accomplishments in each area, keep in mind the goal printed at the bottom of each section.

As we close our fiscal year, July 1, 1990 through June 30, 1991, we are pleased to report AAOHN is in excellent financial condition and is looking ahead to future challenges and the association's 50th anniversary in 1992.

Occupational health nursing must not only prepare for the future, we must take steps to shape it. AAOHN leaders are committed to seeing those steps are taken as we continue to work together for an exciting and dynamic future for all occupational health nurses.

**Sharon L. Muckenfuss, 1989-1991**  
*President*

**Matilda A. Babbitz**  
*Executive Director*

## 1990 - 1991 Board of Directors

**Sharon L. Muckenfuss**  
*President*

**Annette B. Haag**  
*Vice President*

**Janet L. Good**  
*Secretary*

**Richard J. Kowalski**  
*Treasurer*

**Sandra L. Hall**  
**Pat Joseph**  
**Mary C. Kochie**  
**Elizabeth Lawhorn**  
**Joyce Lounsberry**  
**Molly J. McCauley**  
**Judith A. Morris**  
**Barbara P. Panhorst**  
**Bonnie Rogers**  
**Grace O. Rome-Kuhn**  
**Ruth Anne Smith**  
**Suzanne T. Smith**  
**Janie W. Spicer**  
**Diane K. Weist**

## Finance

The Finance Committee, chaired by Treasurer **Richard Kowalski**, directs the financial affairs and plans for the financial security of the association. Other members of the committee were **Joyce Lounsberry, Molly McCauley, Ruth Anne Smith and Janie Spicer**.

The net gain for the year is substantially higher than the amount budgeted for several reasons.

Revenues were 3.3% over budget due to income generated by AOHC continuing education, newsletter advertising and interest exceeding budget projections.

Expenses were 7% under budget, due to cost containment in travel, meeting and personnel expenses, maintenance agreements and office supplies.

This strong fiscal position will enable AAOHN to continue funding the programs members have requested.

The Business and Finance Department policies and programs are implemented by Business and Financial Services Director **Diane James**, Business Specialist **Luverna Akporokah**, and Business Assistants **Marcie Bates** and **Sharon Hulsey**.

## Planning

The Planning Committee, chaired by Vice President **Annette Haag**, included members **Janet Good, Richard Kowalski, Joyce Lounsberry, Molly McCauley, Grace Rome-Kuhn, Ruth Anne Smith and Suzanne Smith**.

The committee is responsible for providing future direction for the association by monitoring and approving each program committee's goals and implementation strategies based on the AAOHN Five-Year Strategic Plan.

## Advisory

The Advisory Committee included Chairman **Annette Haag**, **Barbara Panhorst**, **Rose Scrivner**, **Suzanne Smith** and **Diane Weist**.

The Board of Directors recommended and members approved a bylaws change at the 1991 Annual Session to dissolve the Advisory Committee, in an effort to provide better continuity and communication within the Board.

# Professional Affairs

The Professional Affairs Committee strives to increase professional development by providing effective and quality educational resources to occupational health nurses.

The committee was chaired by **Molly McCauley**, and included **Pat Joseph**, **Mary Kochie**, **Bonnie Rogers** and **Janie Spicer**.

## Education

Each year the association continues to offer traditional educational services while striving to introduce innovative opportunities for occupational health nurses to gain knowledge and build professional skills.

*Tomorrow's Skills For Today's Challenges* was the theme of the 1991 American Occupational Health Conference (AOHC) in San Francisco which attracted over 5,000 participants.

The 2,217 members who attended were able to earn up to 36 contact hours by taking advantage of the 10,597 seats available in 67 continuing education courses and 32 concurrent forums.

The more than 300 AOHC exhibits presented the latest products and services available for occupational health professionals.

Local, state and regional educational programming continues to expand. In continuing education, Volume IV of the Update Series was completed. The CEARP continues to grow with over 220 applications processed for a total revenue of over \$6,000.

As the quality of CE activities improves, competition for the annual Education Awards increases. The following constituent associations (one from each region) received an award for outstanding educational programs: Tri-County New Jersey AOHN; Chicago, Illinois AOHN; Utah AOHN; Oklahoma Central, Oklahoma AOHN; and North Carolina AOHN.

**Implement a Professional Affairs Program that supports professional excellence through the promotion of ethical standards of practice, quality education mechanisms, and development of a knowledge base in occupational health nursing.**

The new Medique Leadership award was presented to **Karen De Tuncoq**. **Sherrie L. Anderson** received the **Charles Turcotte Award**.

*The Comprehensive Guide for Establishing An Occupational Health Service* was reviewed by a Task Force appointed by President **Sharon Muckenfuss**.

## Research

The Research Subcommittee, under the direction of **Bonnie Rogers**, chairman, and committee members **Jacqueline Agnew**, **Jean M. Bey**, **Janet B. Douglass** and **Teresa M. Stavros** completed a comprehensive research module that was published in the *AAOHN JOURNAL*.

*Research Corner*, published quarterly in the *AAOHN JOURNAL*, provided quarterly articles including: *Writing Abstracts*, *Research Presentations*, *Clinical and Research Awards in Occupational Health Nursing*, and *The Question and Answer Part I: Levels of Research Questions*.

The Research Subcommittee also developed a survey form to assess other nursing societies approaches to obtaining funding to support research activities.

Research award guidelines were sent to all Educational Resource Centers and were made available at AOHC regional meetings.

The **Mary Louise Brown Award** was increased from \$1,000 to \$3,000.

Members and staff continue to seek new ways to gain support for nursing research.

## Ethics

The Subcommittee on Ethics, chaired by **Bonnie Rogers**, finalized the Code of Ethics and Interpretive Statements for

the Board of Directors approval. Also serving on the committee were **Karen De Tuncoq**, **Bernadette Heath**, **Jane Parker-Conrad** and **Harriette Zal**.

The committee continued to review reported problems, literature and trends related to occupational health with possible ethical implications.

## Leadership Development

More than 200 constituent association leaders met in Atlanta for the 1990 Conference of Presidents, *Leadership: Professional Challenges of the 90s*.

Members of the staff also conducted leadership development workshops in Tennessee, Atlanta and Southeastern Ohio.

The Professional Affairs Department policies and programs are implemented by Associate Executive Director **Ann R. Cox**, Meeting Services Specialist **Joan T. Kemp**, Continuing Education Coordinator **DeeDee French** and Professional Affairs Assistant **Janet Ingle**.



# Governmental Affairs

The Governmental Affairs Committee, made up of Chairman Suzanne Smith, Mary Kochie, Judy Morris, Barbara Panhorst and Rose Scrivner, assisted AAOHN in becoming a proactive and unified voice for occupational health nurses.

AAOHN continued to work toward an Office of Nursing in OSHA and submitted a proposal for one to the Assistant Secretary of Labor.

With rural health/small business as a focus, AAOHN called upon appropriate government agencies and trade associations to discuss independent occupational health nursing services for small businesses.

A recordkeeping task force was appointed to make recommendations for revisions in the OSHA *Recordkeeping Guidelines for Occupational Injuries and Illnesses*.

Oral testimony was provided at a public hearing on a proposed standard on *Accreditation of Training Programs for Hazardous Waste Operations*.

At the request of the Office of Technology assessment, AAOHN reviewed a draft report for Congress on *Genetics in the Workplace*.

Constituent associations were surveyed on their governmental affairs needs/issues to assist the Governmental Affairs Department in developing a constituent database.

Representatives from Washington, D.C. continue to keep AAOHN informed about pending legislation, regulations and RFP's for grants and positions available in the Federal government.

AAOHN sent two representatives to attend the *Nurse In Washington Internship* held by the National Federation for Speciality Nursing Organizations.

Governmental activity related to the profession is conveyed to members through ProHealth Alert in AAOHN NEWS. ProHealth Alert has increased to a monthly publication due to members' requests for additional national governmental affairs information.

Governmental Affairs policies and programs are implemented by Director of Governmental Affairs and Communications Geraldine Williamson, Governmental Affairs Senior Specialist Peggy Rozelle and Governmental Affairs Assistant Carrie Johnson.

***Establish an internally managed governmental affairs program with both federal and state legislative and regulatory lobbying and monitoring components.***

# Public Affairs

The Public Affairs Committee, chaired by Joyce Lounsbury, directed the association's internal and external communications including marketing.

Other committee members were Sandra Hall, Elizabeth Lawhorn, Barbara Panhorst and Diane Weist.

A primary focus this year was marketing occupational health nursing to small business and industry.

A survey was conducted to determine the effectiveness of the previous year's advertising in human resources and related occupational health magazines.

The firm of Fleishman Hillard conducted a survey of key industries as a first step in our strategy to encourage business and industry to establish occupational health nursing programs.

The Public Affairs Committee determined that chemical and telecommunication companies would be its primary target audience for initial marketing efforts. They are implementing strategies from the research.

AAOHN distributed a feature article on occupational health nursing through

News USA, a company that distributes news to media outlets throughout the country.

The Committee also decided to pursue placement of occupational health nursing articles in the airlines' "in-flight" magazines.

Support for occupational health nursing in the aerospace industry continued with passage of the *Resolution on Occupational Health Nursing in the U.S. Space Program* at the annual business meeting in San Francisco.

A new award for the best constituent association newsletter was created to be presented at AOHC in 1992.

Regular contact with related organizations, government officials, local and trade media alerted external publics of association activities. Internal communication programs included the monthly AAOHN NEWS and AAOHN JOURNAL and member services marketing.

AAOHN NEWS reported on Board

actions, educational and research opportunities, outstanding accomplishments of members and constituent associations and explanations of committee and staff responsibilities.

The newsletter's Employment Information Service continued to be a source of non-dues revenue with more than 68 occupational health nursing positions advertised. Over 28 members seeking employment also advertised in the newsletter.

*Leadership Update* is a quarterly feature in the newsletter. Its purpose is to keep constituent association leaders up-to-date on association activities.

The AAOHN JOURNAL continues to support members' practice with reports on the latest in clinical activity and research findings.

Our desktop publishing technology enabled Communications Specialist Mary Darden to produce attractive and cost-effective publications.

***Implement an external communications program to increase awareness and promote the value of occupational health nurses.***

# Membership

The Membership Committee, under the leadership of Chairman Ruth Anne Smith and committee members Sandra Hall, Pat Joseph, Elizabeth Lawhorn and Grace Rome-Kuhn devised effective methods of recruiting and retaining members.

For the first time in AAOHN history, membership reached 12,000 in 1990.

A national membership campaign, *2000 Thru 2000: The Key to Our Future*, was introduced at the 1990 Conference of Presidents and continued until March 1991. The "Member-Get-A-Member" campaign materials were sent to each constituent membership chairman. A total of 315 members sponsored new members.

The number of local, state and regional constituent associations is now 184 including 147 local associations, 34 state associations, two regional associa-

tions and one international affiliate. Director of Membership Paul Wood continues to meet with groups interested in forming constituent associations.

Winning the Annual Membership Award was the Greater Rochester AOHN. South Carolina State AOHN and Western New York AOHN were runners-up.

The 1990 Constituent Association of the Year Award was given to the Minnesota State AOHN.

The Membership Department exhibited at several professional conferences throughout the year including the *National Student Nurses Association*, *National Safety Council*, *American Public Health Association*, *American Nurses Association*, *American Society of Personnel Administration* and the *American Society of Safety Engineers*.

The Membership Department manages the rental of the association mailing list, a significant source of non-dues income.

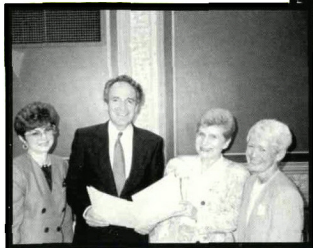
The committee investigated the feasibility of a job placement service versus the current employment referral service.

A membership marketing folder was developed for constituent associations to assist them in communicating the benefits of AAOHN membership.

The Membership Committee continues to provide quality membership campaigns and information to the association's members.

The Membership Department policies and programs are implemented by Director of Membership Paul Wood, Membership Specialist Gayle Brown and Membership Assistants Kathi Ballard and Connie Baptiste.

*Foster continued growth by increasing AAOHN membership by 200 per year.*



## Bylaws

The Bylaws Committee, chaired by Grace Rome-Kuhn, included Marlene Coulter, Janet Good, Judith Morris, Anne Smith and Margaret Thompson. The committee monitored the AAOHN bylaws and reviewed and approved bylaws and amendments for constituent associations.

The Bylaws Committee heard from constituent associations regarding voting by mail and the dues structure.

The committee recommended to continue to use *Leadership Update*, *AAOHN NEWS* and the Conference of Presidents as vehicles for educating the membership on proposed bylaws changes and the activities of AAOHN both on a local and national level.

# Financial Report

## Balance Sheet

June 30, 1991

Assets	
<b>Current Assets</b>	
Cash	\$ 131,751
Certificates of deposit	1,028,763
Receivables	158,950
Prepaid expenses	14,889
Inventories	<u>6,762</u>
<b>Total Current Assets</b>	1,341,122
<b>Property and Equipment</b>	
Land	\$ 114,000
Buildings	598,925
Computers and equipment	140,427
Furniture and fixtures	<u>204,737</u>
	1,058,089
Less accumulated depreciation	<u>282,241</u>
	775,848
<b>Total Assets</b>	<b>\$2,116,970</b>

## Liabilities and Fund Balance

<b>Current Liabilities</b>	
Current maturities of long-term debt	\$ 4,613
Accounts payable and accrued expenses	84,385
Deferred membership dues	540,041
<b>Total Current Liabilities</b>	629,039
<b>Long-Term Debt</b>	483,080
<b>Fund Balance</b>	<u>1,004,851</u>
<b>Total Liabilities and Fund Balance</b>	<b>\$2,116,970</b>

## Statement of Revenue, Expenses and Changes in Fund Balance

June 30, 1991

<b>Revenue</b>	
Membership related income	\$1,847,938
Interest income	65,822
<b>Total Revenue</b>	1,913,760
<b>Expenses</b>	
Depreciation	\$ 61,939
Interest	54,142
Printing and publications	306,755
Salaries and fringe benefits	692,463
Travel	122,775
Other general and administrative	<u>447,300</u>
<b>Total Expenses</b>	1,685,374
<b>Excess of Revenue Over Expenses</b>	228,386
<b>Fund Balance, Beginning of Period</b>	<u>776,465</u>
<b>Fund Balance, End of Period</b>	<b>\$1,004,851</b>

## Independent Auditor's Report

We have audited the accompanying balance sheet of American Association of Occupational Health Nurses, Inc. (a non-profit organization), as of June 30, 1991, and the related statements of revenue, expenses and changes in fund balance, and cash flows for the fiscal year then ended. These financial statements are the responsibility of the Association's management. Our responsibility is to express an opinion on these financial statements based on our audit.

We conducted our audit in accordance with generally accepted auditing standards. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free of material misstatement. An audit includes examining, on a test basis, evidence supporting the amounts and disclosures in the financial statements. An audit also includes assessing the accounting principles used and significant estimates made by management, as well as evaluating the overall financial statement presentation. We believe that our audit provides a reasonable basis for our opinion.

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of American Association of Occupational Health Nurses, Inc. as of June 30, 1991, and the results of its operations and its cash flows for the fiscal year then ended in conformity with generally accepted accounting principles.

August 2, 1991

Smith, Adcock and Company  
Certified Public Accountants

## Notes to Financial Statements

### A) Summary of Significant Accounting Policies

**Recognition of Income** - The Association recognizes revenue and expenses on the accrual method of accounting. Revenue is recognized when earned and expenses when incurred.

**Property and Equipment** - Property and equipment are carried at cost. Expenditures for maintenance and repairs that do not significantly extend the useful lives of the assets are expensed as incurred, while major replacements and betterments are capitalized.

Depreciation is computed principally using the straight-line method over the estimated lives of the assets.

Cost of property sold or otherwise disposed of and related accumulated depreciation are removed from the accounts, and any resulting gain or loss is recognized in income currently.

**Investments** - Investments in certificates of deposit are carried at cost, which approximates market.

**Inventories** - Inventories are valued at the lower of cost, as determined by the first-in, first-out method, or market.

**Membership dues** - Membership dues are generally paid to the association on a calendar year basis. All dues that are applicable to future accounting periods are classified as deferred.

### (B) Income Taxes

The Association is an exempt organization under Internal Revenue Code Section 501(c)(6). However, it is subject to taxes on unrelated trade or business income. Income taxes for the fiscal year ended June 30, 1991 are \$10,014.

### (C) Pension Plan

In 1981, the Association established a funded, defined benefit pension plan for all eligible employees. Each participant contributes to the plan an amount equal to two percent (2%) of basic annual compensation. The Association was required to make a contribution of \$21,624 for the plan year ended December 31, 1990.

### (D) Long-Term Debt

The long-term debt of the Association consists of a mortgage, secured by a Deed to Secure Debt and Security Agreement and the Assignment of Leases, Rents, and Profits.

On April 1 of each year during the mortgage term, the initial interest rate shall be adjusted to the rate per annum which is equal to the weekly average yield on United States Treasury securities adjusted to a constant maturity of one (1) year, as made available by the Federal Reserve Board, plus 3.25% per annum. The interest rate as of June 30, 1991 is 9.84%.

Estimated maturities of the long-term debt, based on the current interest rate, are as follows:

June 30, 1993	\$ 5,072
June 30, 1994	5,574
June 30, 1995	6,126
June 30, 1996	6,732
June 30, 1997	7,399
Later years	452,177

### (E) Statement of Cash Flows

The Association considers all highly liquid debt instruments to be cash equivalents. Cash payments during the year include \$54,142 for interest and \$5,262 for income taxes.