



STATE BOARD OF OPTOMETRY
 2450 DEL PASO ROAD, SUITE 105, SACRAMENTO, CA 95834
 P (916) 575-7170 F (916) 575-7292 www.optometry .ca.gov



Continuing Education Course
 Approval Checklist

Title:

Provider Name:

- Completed Application
 - Open to all Optometrists? Yes No
 - Maintain Record Agreement? Yes No
- Correct Application Fee
- Detailed Course Summary
- Detailed Course Outline
- PowerPoint and/or other Presentation Materials
- Advertising (optional)
- CV for EACH Course Instructor
- License Verification for Each Course Instructor
 - Disciplinary History? Yes No



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CONTINUING EDUCATION COURSE APPROVAL APPLICATION

\$50 Mandatory Fee

Pursuant to California Code of Regulations (CCR) § 1536, the Board will approve continuing education (CE) courses after receiving the applicable fee, the requested information below and it has been determined that the course meets criteria specified in CCR § 1536(g).

In addition to the information requested below, please attach a copy of the course schedule, a detailed course outline and presentation materials (e.g., PowerPoint presentation). Applications must be submitted 45 days prior to the course presentation date.

Please type or print clearly.

Form section for Course Title and Course Presentation Date. Course Title: The Business of Optometry. Course Presentation Date: 11/06/2016.

Course Provider Contact Information

Form section for Provider Name. Name: Lisette Rosales.

Form section for Provider Mailing Address. Street: 4353 Park Terrace Dr. #150, City: Westlake Village, State: CA, Zip: 91361.

Form section for Provider Email Address. Email: lrosales@daughertylaser vision.com

Form section for Will the proposed course be open to all California licensed optometrists? YES (checked) NO

Form section for Do you agree to maintain and furnish to the Board and/or attending licensee such records of course content and attendance as the Board requires, for a period of at least three years from the date of course presentation? YES (checked) NO

Course Instructor Information

Please provide the information below and attach the curriculum vitae for each instructor or lecturer involved in the course. If there are more instructors in the course, please provide the requested information on a separate sheet of paper.

Form section for Instructor Name. Name: David Golden.

Form section for License Number and License Type. License Number: 79763, License Type: physician surgeon A

Form section for Phone Number and Email Address. Phone Number: (510) 314-8213, Email Address: David.golden@perc Alliance.com

I declare under penalty of perjury under the laws of the State of California that all the information submitted on this form and on any accompanying attachments submitted is true and correct.

Signature of Course Provider (Handwritten signature)

Date: 2.15.17

David Golden presentation start and end time: 11:00 a.m. -12:00 p.m. = 1 hour

Dr. David Golden Paragraph Summary

The business of Optometry is changing. The competitive landscape is forcing independent practices to focus on integrating with supply chains and efficiently managing the internal operations to deliver quality and affordable care. This talk explains what is supply chain, how it is best implemented and why it is so important to running an efficient optometry practice. The lecture will focus on the strengths of the independent practice and ways to compete in a changing healthcare environment.

Lecturer: David Golden, OD
1700 W Cameron Ave. Suite 200
West Covina, CA 91790
626-502-1882

Title: WHAT and WHY Supply Chain is Important to Your Business/Practice

Outline:

1. What is supply Chain
 - a. Competitive advantage
 - i. Cost savings
 - ii. More efficient
 - b. Increased control of the dispensary
2. Why is it important for your dispensary
 - a. Inventory control
 - i. Best selling styles
 - ii. Virtually no back orders
 - b. Predictability of complete Rx
 - c. Differentiate using Exclusive Brands
 - d. Cost savings
3. Online Solutions
 - a. Omni Channel – understanding our patients as consumers
 - i. How it works
 - ii. Why it is important
 - b. Solution
 - i. Fitting Box
 - ii. Ampersand
 - iii. PERC/IVA Distribution Center


The Business of Optometry

Supply Chain and Lean Processing – Two Pieces of the Puzzle

David Golden, OD
President & Co-Founder PERC


PERC·IVA

The Business of Optometry Broken Into Parts



PERC·IVA

The Business of Optometry Broken Into Parts




PERC·IVA

Independent Practices What Makes Us Competitive

- Doctor and Staff invested practice and community
- Highly personalized care and service
- Flexibility – customized solutions for patients
- Trust – higher standard
- Quality and Accuracy of Products – Frames and Lenses

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The Business of Optometry Broken Into Parts



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Supply Chain: What & Why What is It?

- Supply chain is an ecosystem to create efficiency between:
 - People
 - Organizations
 - Activities
 - Information
 - Resources
- All coordinated to efficiently move a product or service from:
Supplier to Customer

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Supply Chain: What & Why Why Is It Important?

Efficiency inside the practice creates opportunity

- Lower operating costs
- Great patient experience
 - The Right product
 - At the Right cost
 - Delivered at the Right time
 - Delivered to the Right place

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Supply Chain The Independents' Achilles Heal

- Stuck in the middle of the supply chain without leverage or scalability
- Our competition are building (or built) vertical integrated supply chains
 - Luxottica: Complete vertical integration with EyeMed patients, Luxottica Frames, Direct Competitive retail (Lenscrafters, PEARLE, JCPenny's, SEARS etc.), 800-GLASSES online and now building labs
 - Large, professionally managed regional groups are consolidating practices
 - VSP: Complete vertical integration with Patients, Frames, Lenses, ICONIC online and Labs
 - Foreign entities are entering the US Market: SpecSavers, FYIdoctors, and others
 - Walgreens & CVS are beginning to "test" the eye care integrated concept
- What they all have in common is an efficient SUPPLY CHAIN

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Supply Chain for the Independent Advantage

- Bulk purchasing discounts go to the BOTTOM line – Increase PROFIT!
- Creates efficiency –
 - Best selling opticians with patients
 - User-friendly online ordering – eliminates steps and days
- Fast, FREE shipping
- Board Management
 - Data driven purchasing – only best selling styles
 - Increase Capture Rate
 - Increase Inventory Turn Rate
- Our inventory position minimizes backorders
- Integrated Laboratory – guarantees on time Rx delivery

PERC·IVA

PERC & IVA Advantage - Opticians Facilitates Premium Product Dispensing

- Dispensing premium products requires optician TIME
 - Product education requires time to explain
 - Lifestyle dispensing requires time to understand patient needs
 - Patient satisfaction requires time to build trust
- Dispensing premium products produces more profit
 - Opticians are trained to sell, yet they spend less than 50% of their time selling

PERC·IVA

PERC & IVA Advantage - Opticians Reduces Non-Patient Facing Work

Work Performed	Avg. per day	Advantage
Unpacking frames and reshipping frames to the lab	30 min	Eliminated
Receiving and checking completed Rx orders lab	40 min	Same
Working with frame reps/Managing Inventory	20 min	Eliminated
Pricing and organizing new product for frame boards	10 min	Reduced
Calling patients for delays or dispense	20 min	Reduced
Entering orders in system or insurance	120 min	Same
Other misc	20 min	Reduced

4+ Hours/Day

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PERC & IVA ADVANTAGE Better for the Doctors & Opticians

Doctor – Practice Profitability

- Cost of Goods
 - Increase profitability per patient
 - Better value to patient
- Inventory Management
 - Increased Turn Rate
 - Less returned SKU's
- Capture Rate
- Productivity
- Patient Satisfaction

Optician – Increased Efficiency

- Predictability
- Smart Retailing
 - Len Portfolio – less confusing pt and staff
 - Brand/Style representation – less duplication
- Exclusive Brands
 - Protect profit and patient
 - Quality craftsmanship
- Ease of ordering
- Patient Experience

PERC·IVA



PERC & IVA ADVANTAGE Integrated LAB & Frame Inventory

- Connecting the LAB to the FRAME
- Efficiency in TIME
 - Frame pulled for Rx lab
 - Frame direct shipped to lab
 - Saves staff hours
 - Saves shipping costs
- Create \$\$ savings
- Guaranteed predictability - SLA

PRODUCT PORTFOLIO

Single Vision/Eyezen+

Flat Top 28

Varilux S® Series Lenses
 Varilux® Physio® W3+ lenses
 Varilux Comfort® W2+ lenses
 Varilux Comfort® DRx lenses

KODAK Unique lenses

Shamir Autograph II®

Shoreview Digital Poly PAL

PERC-IVA

PERC & IVA ADVANTAGE Guaranteed Service Level (SLA)

- The service Level Agreement (SLA) guarantees a competitive delivery timeframe
- PERC Advantage Frames ordered with PERC Portfolio Lenses

Lens Type	Guaranteed SLA
Single Vision	Shipped in 4 Business Days or less
PAL / Flat Top	Shipped in 5 Business Days or less
Specialty	Shipped in 7 Business Days or less

- If the SLA is not achieved, the Member will receive a 50% discount on the lens purchase price from Essilor Labs

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PERC + IVA Advantage Summary

Frame Distribution for the Independent

- Discounts go to the BOTTOM line – increase PROFIT!
- Efficient, user-friendly online ordering
- Fast, FREE shipping
- Board Management
 - Data driven – only best selling styles
 - Increase Capture Rate
 - Increase Inventory Turn Rate
- Our inventory position minimizes backorders

PERC·IVA

PERC & IVA Membership Summary

- Capitalize on some of the best industry pricing
- Free Membership
- Quarterly Vislakon & CooperVision Rebates
- Centralized frame distribution – “PERC / IVA Advantage”
- iCare Health Solutions – Connecting to healthcare delivery
- Practice Management
 - PERC Essentials
 - Shared Services - Our vision
- Education and Consulting services with local meetings
- Community of elite practices

PERC·IVA
Empowering
Independent

Thank You

David Golden, OD
President & Co-Founder PERC
David.Golden@percalliance.com
818-314-8213

PERC·IVA

David B. Golden, OD

Curriculum Vitae

1026-B West Covina Parkway
West Covina, CA 91790
626-962-5868

Education	SOUTHERN CALIFORNIA COLLEGE OF OPTOMETRY 1987 Doctor of Optometry, Graduated 'With Distinction' <i>Senior Research Project: "An Extended Wear Study Using the Paraperm EW Hard Gas Permeable Contact Lenses"</i> Golden. D., Linde, B., Edrington, T., Paugh, J.
	SOUTHERN CALIFORNIA COLLEGE OF OPTOMETRY 1985 Bachelor of Science
	UNIVERSITY OF HOUSTON, COLLEGE OF OPTOMETRY Institute for Contact Lens Research Summer Research Fellowship funded by the national Health Institute May 1985 – August 1985
	UNIVERSITY OF CALIFORNIA, BERKLEY Major in Microbiology, August 1980– June 1983 510-642-4111
Professional Experience	PRIVATE PRACTICE , Whittier, CA: West Covina, CA: Pasadena, CA 1987 to present General optometry practice
	VERGE Health Solutions, Co-founder 2011 – present Managed care delivery platform – full risk eye care model
	PERC Holdings, LLC President & Co-founder 2009 - Present A subsidiary of Essilor of America Professional Eyecare Resource Co-Operative (PERC) Infinity Vision Alliance (IVA)
	SOUTHERN CALIFORNIA COLLEGE OF OPTOMETRY 1987 to 1991 <i>Adjunct Clinical Instructor</i>
	ARIS Vision Institute, Co-founder and Director of Optometry 1996 – 2001 Sold asset to Gimbal Vision (Canada)
	ALBUQUERQUE INDIAN HOSPITAL , Albuquerque, New Mexico 1987 Public Health Service division
Research:	ALLERGAN OPTICAL, Inc. , FDA Clinical Investigator 1995 Contact Lens Solution Study (Second generation product)

Contact Lens Solution Study (Complete)	1994
Contact Lens Solution Study	1992
Contact Lens Solution Study (Multi-purpose solution)	1991
Contact Lens Study	1989
Contact Lens Solution Study	1989
Single Use Contact Lens Study	
Single Use Contact Lens Study: Second Generation	

CIBA VISION CORPORATION, FDA Clinical Investigator
 Lens Comparison Study

David B. Golden, O.D.
 resume, page 2

Research (continued)

“Comparing Oxygen Uptake of Two Hydrogel Lenses Using Equivalent Oxygen Percentage,” Borish, I., Benjamin, W., Golden D. – 1985

“Comparing Hydrogel Lens Dehydration Under Open and Closed Eye Conditions”
 Benjamin, W., Golden D. – 1985

The Effect of Diabetes on Blue Cone Sensitivity

Adams, A., Golden, D.: Laboratory Assistant at University of California, Berkley – 1980 to 1983

Affiliations

America Optometric Association
 California Optometric Association
 Rio Hondo Optometric Society
 Beta Sigma Kappa – Optometric Honor Fraternity