



101st House of Delegates Annual Meeting

Friday, July 16, 2021

9 am – 2 pm CT

(Breaks and adjournments for lunch will take place throughout the meeting)

Call to Order and Welcome	Ray L. Morrison, DO, Speaker. House of Delegates
Presentation of Colors	Emerald Society / Chicago Police Department AOA Board of Trustees
Pledge of Allegiance	2LT Albert 'Os' Nakayama, OMS, President, Student Association of Military Osteopathic Physicians and Surgeons
National Anthem	Jessie Chen, DO
Memorial Observance	Ray L. Morrison, DO, Speaker. House of Delegates
Invocation	William S. Mayo, DO, AOA Past President – 122 nd
Osteopathic Pledge of Commitment	AOA Board of Trustees
Colleges of Osteopathic Medicine Presentation	
Advocates of the American Osteopathic Association	Caryn Tabby, AAOA President
2020 / 2021 AOA Presidential Address	Thomas L. Ely, DO, President
Credentials Committee Report	Scott S. Cyrus, DO, Chair Mark E. Eastman, DO, Vice Chair
HOD Committee on Rules and Order of Business	Jeffrey Dunkelberger, DO, Chair
Nominations: AOA Officers, Board of Trustees, Officers of the House of Delegates	Ray L. Morrison, DO, Speaker, Speaker. House of Delegates



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AOA Officers

- President-Elect (one year term / 2022)
- First Vice President (one year term / 2022)
- Second Vice President (one year term / 2022)
- Third Vice President (one year term / 2022)

AOA Board of Trustees

- Name (expired term / 2021) (three-year term / 2024)
- Name (expired term / 2021) (three-year term / 2024)
- Name (expired term / 2021) (three-year term / 2024)
- Name (expired term / 2021) (three-year term / 2024)
- Name (expired term / 2021) (three-year term / 2024)
- Name (expired term / 2021) (three-year term / 2024)
- Name (expired term / 2021) (three-year term / 2024)
- New Physician in Practice (one year term / 2022)
- Postdoctoral Trainee (one year term / 2022)
- Student (one year term / 2022)

Officers of the House of Delegates

- Ray L. Morrison, DO, Speaker of the House (one year term / 2022)
- David L. Broder, DO, Vice Speaker of the House (one year term / 2022)

Reports of the American Osteopathic Association

- Chief Executive Officer's Report Kevin M. Klauer, DO, EJD, CEO
- AOA Financial Report Ronald R. Burns, DO, Chair, Finance Committee / Joint Board-House Budget Committee
- AOA Strategic Plan Report Geraldine T. O'Shea, DO, Chair, Strategic Planning Committee

2020 / 2021 Departmental Chair Reports

- Affiliate Relations James M. Lally, DO, Chair
- Business Affairs Robert G.G. Piccinini, DO, Chair
- Educational Affairs Shannon C. Scott, DO, Chair
- Governmental Affairs Teresa A. Hubka, DO, Chair
- Professional Affairs / Membership Richard R. Thacker, DO, Chair
- Research and Public Health Robert W. Hostoffer, DO, Chair



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Single Accreditation System – Report on H800	Boyd R. Buser, DO, Past President Karen J. Nichols, DO, Chair, ACGME
JOM Editor in Chief Report	Ross D. Zafonte, DO, Editor in Chief
2021 A.T. Still Memorial Lecture 2021 A.T. Still Bust Presentation	Sarah J. Wolff, DO Jeffrey S. Grove, DO, President, American Osteopathic Foundation
American Osteopathic Foundation Report	Jeffrey S. Grove, DO, President
AOA 2021 Awards Presentation <ul style="list-style-type: none">▪ Northup Award▪ Bob E. Jones, CAE Award▪ Distinguished Service Award	Thomas L. Ely, DO, President
2021 Presidential Citations	Thomas L. Ely, DO, President
Special Recognition	Ray L. Morrison, DO, Speaker, Speaker. House of Delegates
HOD Process	Ray L. Morrison, DO, Speaker, Speaker. House of Delegates

Reference Committee Meetings

Friday, July 16

3 – 5 pm CT

Reference committee open sessions will run concurrently, similar to those held during the in-person meeting. Registration is required to attend the open sessions of the Reference Committees.

Upon completion of registration, an email confirmation will be provided that contains the separate Zoom access information for each reference committee.

[Click here](#) to register for the Reference Committee meetings.



101st House of Delegates Annual Meeting

Saturday, July 17, 2021

10 am – 6 pm CT

Call to Order / Reconvene Meeting	Ray L. Morrison, DO, Speaker, House of Delegates
Voting Process <ul style="list-style-type: none">▪ ElectionBuddy Online Voting	Charles “Bud” Templin, VP, Information Technology
Credentials Committee Report	Scott S. Cyrus, DO, Chair Mark E. Eastman, DO, Vice Chair
HOD Committee on Rules and Order of Business	Jeffrey Dunkelberger, DO, Chair
House of Delegates Reference Committee Reports <ul style="list-style-type: none">▪ Ad Hoc	Ray L. Morrison, DO, Speaker, House of Delegates Henry L. Wehrum, DO, Chair Joshua D. Lenchus, DO, Vice Chair
House of Delegates Reference Committee Reports <ul style="list-style-type: none">▪ Constitution and Bylaws	Ray L. Morrison, DO, Speaker, House of Delegates Linda F. Delo, DO, Chair Thomas S. Dardarian, DO, Vice Chair
House of Delegates Reference Committee Reports <ul style="list-style-type: none">▪ Educational Affairs	Ray L. Morrison, DO, Speaker, House of Delegates Lori A. Kemper, DO, Chair Thomas J. Mohr, DO, Vice Chair
Installation of 2021 / 2022 AOA President	Thomas L. Ely, DO, 2020 / 2021 President
2021 / 2022 Presidential Inaugural Address	Joseph A. Giaimo, DO, President
Virtual Celebration	



101st House of Delegates Annual Meeting

Sunday, July 18, 2021

9 am – 6 pm CT

(Breaks and adjournments for lunch will take place throughout the meeting)

Call to Order / Reconvene Meeting	Ray L. Morrison, DO, Speaker, House of Delegates
Voting Process <ul style="list-style-type: none">▪ ElectionBuddy Online Voting	Charles “Bud” Templin, VP, Information Technology
Credentials Committee Report	Scott S. Cyrus, DO, Chair Mark E. Eastman, DO, Vice Chair
Election: AOA Board of Trustees and Officers	Ray L. Morrison, DO, Speaker, House of Delegates Kevin M. Klauer, DO, EJD, Secretary
House of Delegates Reference Committee Reports <ul style="list-style-type: none">▪ Joint Board / House Budget Review Committee	Ray L. Morrison, DO, Speaker, House of Delegates Ronald R. Burns, DO, Chair Teresa A. Hubka, DO, Vice Chair
House of Delegates Reference Committee Reports <ul style="list-style-type: none">▪ Professional Affairs	Ray L. Morrison, DO, Speaker, House of Delegates David K. Best, DO, Chair Lisa Witherite-Rieg, DO, Vice Chair
House of Delegates Reference Committee Reports <ul style="list-style-type: none">▪ Public Affairs	Ray L. Morrison, DO, Speaker, House of Delegates Michael Joseph Zawisza, DO, Chair Andrew D. Adair, DO, Vice Chair
House of Delegates Reference Committee on Resolutions	Ray L. Morrison, DO, Speaker, House of Delegates John J. Kowalczyk, DO, Chair Dawn R. Tartaglione, DO, Vice Chair
Old Business	Ray L. Morrison, DO, Speaker, House of Delegates
Adjournment	Ray L. Morrison, DO, Speaker, House of Delegates



AMERICAN
OSTEOPATHIC
ASSOCIATION

2021 Departmental Reports

Report of the Department of Affiliate Relations
James M. Lally, DO, Chair
July 16, 2021

This report highlights activities of the Department of Affiliate Relations from August 1, 2020, to July 1, 2021.

Establish a process and mechanism for affiliate leaders to provide input on critical issues being considered by the AOA BOT.

- The establishment of a separate bureau for affiliate relations provided a formal mechanism for the affiliate leaders to provide input to the AOA BOT.
- Three BAR meetings were held this fiscal year (November 19, February 17, and May 11).
- In addition, 11 town hall meetings on specific issues and topics requested by affiliate leaders were held during which input on critical issues was provided.

Receive and consider affiliate leader input and communicate such information to the President and BOT.

- President Ely attended all BAR meetings, as did President-Elect Giaimo.
- In addition, during monthly calls with BAR Chairperson, Dr. James Lally, staff shared feedback from affiliate leaders as it related to the governance process and affiliate activities. Drs. Ely and Giaimo participated in nearly all of these calls.
- In order to recognize the important role that affiliates play in the advancement of the osteopathic profession, the bureau considered and approved criteria to reinstate the Bob E. Jones, CAE Award as well as create a new award - the Outstanding Affiliate Awards - to debut at OMED 2021.

Participate in the development of an affiliate leader educational program.

- Discussions were held during BAR meetings, and input has been provided by all affiliates via Quarterly Affiliate Calls and Town Hall meetings.
- An affiliate leader track was included in DO Day which included 3 educational sessions.
- Chief among the suggestions from the BAR members and affiliate leaders at large was that we create an “AOA 101” program. This onboarding/educational program was designed to assist new affiliate leaders with their assimilation into their new roles.
 - The *Affiliate Leader AOA 101 Onboarding Video Series* features introductory videos from Dr. Klauer, each member of the Department of Affiliate Relations team, and members of the AOA senior leadership team across 12 AOA departments.
 - The program launched in *Affiliate News* on June 23.

Report of the Department of Business Affairs
Robert G.G Piccinini, DO, Chair
July 16, 2021

This report highlights activities of the Department of Business Affairs from August 1, 2020 to June 1, 2021.

Finance Committee

- Approved a balanced AOA FY 2022 Operating Budget in FY 2021.
- Approved the AOA FY 2022 Capital Budget in FY 2021.
- Approved new AOA Investment Advisor, Taiber, Kosmala & Associates in FY 2021.
- The annual audit of the FY 2020 AOA financial statements resulted in the best opinion achievable.
- The projected net operating surplus was reported at \$4.3 million for FY 2021*.
- The projected reserve balance of \$51.2 million at May 31, 2021 reflects a reserve percentage of 126.2% of total operating expenses two years earlier as compared to a 75% reserve requirement.*
- Fully anticipate that the annual audit of the FY 2021 AOA financial statements will result in the best opinion achievable*.

*Note: As of June 30, 2021 the FY 2021 Audit is in progress.

Report of the Department of Educational Affairs
Shannon C. Scott, DO
July 2021

This report highlights the activities of the AOA Bureaus, Councils and Committees that report to the Department of Education Affairs for 2020-2021.

Commission on Osteopathic College Accreditation (COCA)

- The Commission continues the process of supporting its petition for renewal of federal recognition, initially filed last year with the U.S. Department of Education.
 - The Commission responded to additional questions and requests from Department staff for additional supporting evidence during the last year.
 - Following those responses, Department staff provided their final staff analysis on the Commission's petition, finding no issues or problems and recommending renewal of the agency's recommendation for five years.
 - The petition will be reviewed by the National Advisory Commission on Institutional Quality and Integrity at its meeting on July 27-29, 2021.
- For the 2021-22 academic year, the COCA will accredit 37 colleges of osteopathic medicine (COMs) operating in 58 sites.
 - One new college of osteopathic medicine will begin instruction in the 2021-22 academic year: Noorda College of Osteopathic Medicine in Provo, UT
- The COCA continues to provide guidance to Colleges of Osteopathic Medicine on compliance with accreditation standards due to disruptions related to the COVID-19 pandemic, including the use of distance education.
- The COCA conducted all site visits in the 2020 – 2021 academic year virtually.
- The COCA updated its substantive change policies and procedures.

Bureau of Osteopathic Education (BOE)

- The BOE provided oversight on issues impacting undergraduate medical education (while preserving the necessary autonomy of COCA) by providing input on the AOA's organizational statement on COMLEX Level 1 moving to pass/fail reporting.
- The BOE provided oversight on issues impacting graduate medical education by providing input to the ERAS Advisory Committee on the 2020-2021 recruitment season and input on the "ideal state" of the transition from UME to GME for the Coalition on Physician Accountability UME-to-GME Review Committee.
- Following the 2020 AOA governance changes, the Council on Osteopathic Continuing Medical Education was dissolved and the governance oversight of AOA Category 1A sponsor accreditation became solely BOE's responsibility. The BOE reviewed the AOA CME accreditation and ACCME Joint Providership activities and whether the activity was governance-related (under the oversight of BOE) or operational (implemented by the Physician Education and CME team).
- The BOE provided oversight on issues impacting continuing medical education by providing feedback on opportunities to enhance the requirements for osteopathic distinct CME and recommended revisions to the sponsorship requirements for healthcare facilities.
- The BOE provided governance oversight to the Council on OMED, Program and Trainee Review Council, and Council on Council on Osteopathic Graduate Medical Education Development.
- The BOE received reports from its ex-officio members, affiliate osteopathic educational associations, and the conclusion of the transition to the single GME accreditation system.
- The BOE reviewed 2016 House of Delegates resolutions through its sunset review process.

Report of the Department of Educational Affairs
Shannon C. Scott, DO
July 2021

Program and Trainee Review Council (PTRC)

- The PTRC continued to monitor AOA-accredited residency and fellowships under its restricted accreditation authority. These programs did not achieve ACGME accreditation by June 30, 2020 but still have residents in training. The AOA has the authority to continue to accredit these programs until all residents graduate so they can complete training in an accredited program and advance to AOA board eligibility.
- The PTRC implemented a survey that was sent to all residents in programs under AOA's restricted accreditation authority and met with residents and program leadership as needed.
- The PTRC worked collaboratively with osteopathic specialty colleges to ensure that the appropriate standards are maintained for the training programs and individual resident's training is approved as complete.

Council on Osteopathic Graduate Medical Education Development (COGMED)

- The COGMED provided governance oversight with respect to the expansion of Osteopathic Recognition in ACGME programs by providing input on new support tools developed to assist programs with applying for Osteopathic Recognition and on potential opportunities to recognize the work of the residents that complete the ACGME osteopathic educational requirements.
- The COGMED also assisted in sourcing candidates for ACGME appointments to 20 Review and Recognition Committees.

Council on OMED

- The Council on OMED provided governance oversight with respect to the annual OMED conference.
- The Council on OMED provided a report to the Board of Trustees and the Bureau of Osteopathic Education following the Virtual OMED:
 - Final registration was 3,862 attendees, of which 3,136 were DOs.
 - 419 registrants were first-time attendees and 527 were non-members.
- The Council on OMED participated with AOA leadership in the selection of Keynote speakers.
- The Council on OMED provided a one-day multidisciplinary collaboration during Virtual OMED 2020 on pain management.
- The Council on OMED is providing governance oversight to OMED 2021 which will be launched as a hybrid, three-day conference. The in-person portion will be held Oct. 22-24 in Phoenix, Arizona. Hosting the conference in person and virtually will make it feasible for additional osteopathic specialty affiliates to participate and provide CME to an expanded market. This format also provides flexibility for attendees.

Bureau of Osteopathic Specialists (BOS)

- The BOS provided governance oversight to the AOA's 16 specialty certifying boards, offering certifications in 27 primary specialties and 49 subspecialties. The full BOS convened for its Annual meeting in September 2020 and for its Midyear meeting in April 2021. The BOS Executive Committee, which acts on behalf of the full BOS between meetings, convened on a monthly basis.
- The Distinct Osteopathic Examination Committee was established to develop the written and practical examinations associated with initial certification for Pathway II that was previously approved by the BOS and BOT.
- The BOS developed policy for physicians who hold an active ABMS primary certification that allows for entry into the OCC process.

Report of the Department of Educational Affairs
Shannon C. Scott, DO
July 2021

- At its Annual meeting, the BOS adopted a Code of Conduct policy relating to irregular and improper behavior during examinations, which was added to the Handbook of the BOS along with a number of other revisions and updates.
- At its Midyear meeting, the BOS agreed to maintain a three (3) year board certification CME cycle for Component 2 of OCC.
- Prior to the Annual meeting, the BOS Appeal Committee convened and acted on one appeal.

Report of the Department of Governmental Affairs
Teresa A. Hubka, DO, Chair
July 16, 2021

This report highlights the activities of the Department of Governmental Affairs from August 2021 to June 2021.

Bureau on Federal Health Programs

- This past year, the bureau completed the following goals:
 - Advise the AOA BOT on federal legislative and regulatory issues impacting the practice of osteopathic medicine and the AOA's membership.
 - Provide oversight to the communication of critical BFHP, CERA and CSHA updates to the osteopathic community.
 - Provide governance oversight to the AOA's grassroots legislative advocacy program.
 - Support the Training in Policies Studies Program.
 - Provide governance oversight to the CERA.
 - Provide governance oversight to the CSHA.
 - Provide input to staff for assistance to divisional societies and specialty colleges with respect to state and regulatory initiatives.
- In accomplishing these goals, the bureau held five meetings this year; the first of which was a joint meeting with the Council on Economic and Regulatory Affairs and Council on State Health Affairs. The last meeting included discussions and presentations from outside speakers, including AOA nominees to federal advisory committees as well as members of Congress and Congressional leadership staff.
- Throughout the year, the BFHP provided input and guidance to AOA public policy staff on federal legislative and regulatory issues impacting the osteopathic community, oversight of grassroots advocacy, support for the AOA Training in Policy Studies Program, and input on collaboration with divisional societies and specialty colleges.
- The BFHP's leadership guided AOA collaboration with osteopathic affiliates and grassroots advocacy throughout the year. Activities included monthly Osteopathic Advocacy Network calls, as well as grassroots advocacy campaigns and letters, many of which were organized in partnership with osteopathic affiliates. Collectively, these efforts led to important public policy wins in states and at the federal level that benefit osteopathic physicians and students, and the patients they serve. These include:
 - A multiyear reauthorization and funding increase for the Teaching Health Center Graduate Medical Education Program (THCGME).
 - A resolution to balance billing disputes that is fair to physicians while ending surprise medical billing for patients.
 - Stopping cuts to Medicare payments.
 - Securing additional funding for PPE for healthcare providers.
 - Financial relief for physicians through the Provider Relief Fund.
 - Expanded telehealth coverage and service flexibilities, and payment parity.
 - An expansion of civil liability protections for the healthcare workforce during the COVID-19 pandemic.
- Lastly, the BFHP reviewed and submitted 31 resolutions for the 2021 House of Delegates, which includes:
 - 28 Sunset Resolutions, 10 of which the bureau recommended for amendment.
 - 1 resolution referred to the bureau by the 2020 House of Delegates.
 - 2 resolutions drafted by residents participating in the AOA Training in Policy Studies (TIPS) Program.

Report of the Department of Governmental Affairs
Teresa A. Hubka, DO, Chair
July 16, 2021

Council on Economic and Regulatory Affairs

- The council, previously organized as the Bureau on Socioeconomic Affairs, worked on the following goals this year:
 - Advise the AOA BOT on healthcare business or practice management-related issues impacting the practice of osteopathic medicine and the AOA's membership.
 - Recommend resource development to enhance AOA membership value.
 - Identify and monitor payer behaviors adversely impacting our members.
 - Recommend strategies to address payer behaviors or policies adversely impacting our members.
- The council held five meetings this year in addition to the joint bureau and council meeting in September 2020. CERA meetings served an important function for the AOA, as they provided an opportunity for council input on the development of AOA comments on regulatory proposals, many of which revolve around physician payment, administrative burden, health information technology, and other practice management policies.
- The CERA's input on proposed changes to the Medicare Physician Fee Schedule, hospital inpatient services, graduate medical education, HIPAA compliance requirements, payment rules on COVID-19 vaccine administration, and drug pricing proposals have informed comments and positions on policy proposals that were taken to BOT leadership for approval before submission on behalf of the AOA. Many of the policy changes recommended by the AOA, with input from the CERA, were adopted in final rulemaking. These include continued coverage for expanded telehealth services, appropriate payment for COVID-19 vaccine administration, as well as a decision to not move forward with a drug pricing rule that could have negatively impacted Medicare Part B payments.
- CERA members also continued to play an indispensable role in the AOA's engagement with the Centers for Medicare & Medicaid Services (CMS) on the development of a new framework for the MIPS program for chronic and preventive care services, known as MIPS Value Pathways (MVPs). Members of the CERA contributed to the MVP framework and participated in meetings with CMS throughout the year.
- Lastly, the CERA reviewed and submitted 38 resolutions for the 2021 House of Delegates, which includes:
 - 36 Sunset Resolutions, 26 of which the bureau recommended for amendment.
 - A consolidated telehealth policy white paper.
 - 1 resolution drafted by a resident in the AOA Training in Policy Studies (TIPS) Program.

Report of the Department of Governmental Affairs
Teresa A. Hubka, DO, Chair
July 16, 2021

Council on State Health Affairs

- The council, previously organized as the Bureau on State Government Affairs, worked on the following goals this year:
 - Provide governance with respect to state legislative and regulatory issues impacting the practice of osteopathic medicine and the AOA's membership.
 - Make recommendations to the AOA BOT, regarding how the AOA may assist divisional societies and specialty colleges, regarding state legislative and regulatory initiatives.
 - Provide input to staff for the assistance to divisional societies and specialty colleges with respect to state and regulatory initiatives.
- The council held three meetings this year in addition to the joint bureau and council meeting in September 2020. CSHA meetings served an important function for the AOA, as they provided an opportunity for council input on the development of the AOA's annual state government affairs priorities, which include:
 - Opposing scope of practice expansion attempts and creation of new licensure types.
 - Recognizing the distinctiveness of osteopathic medical education and training, and protecting equivalency for DOs and osteopathic medical students, as well as osteopathic examinations and board certifications.
 - Enhancing coverage and payment for telehealth services.
 - Supporting enhanced federal, state and local coordination and preparedness for future public health emergencies.
- Additionally, the CSHA provided input throughout the year on AOA state government affairs and advocacy collaboration with divisional societies and specialty colleges. These discussions have fostered increased engagement with specialty colleges on state legislative initiatives and resulted in greater inclusion of specialty colleges in state legislative advocacy. The council's work supported letters on 18 different topics in 11 states, and at least 21 grassroots alerts in 12 states, with six specialty colleges participating state grassroots campaigns this past year. So far, these activities have resulted in 13 wins and 7 in losses, with the remainder outstanding until those states adjourn for the year.
- Lastly, the CSHA reviewed and submitted 15 resolutions for the 2021 House of Delegates. This includes:
 - 13 Sunset Resolutions, 6 of which the council recommended be amended, including significant revisions to a white paper on CONCUSSION, RETURN-TO-PLAY AND RETURN-TO-LEARN, and 2 of which the council recommended be sunset.
 - 1 2020 referred resolution that included revisions to a white paper, INTRACTABLE AND/OR CHRONIC PAIN.

Report of the Department of Professional Affairs
Richard R. Thacker, DO, Chair
July 16, 2021

This report highlights activities of the Department of Professional Affairs from August 1, 2010 to June 1, 2021.

Bureau of Emerging Leaders

- In addition to the 15 members appointed to the Bureau of Emerging Leaders, there are approximately 65 additional osteopathic medical students, residents, fellows, and new physicians in practice engaged with the BEL's work.
- Developed a quarterly newsletter for its constituents, titled "Looking Forward." Each BEL constituency group (new physicians in practice, residents/fellows, and students) receive a version of the newsletter that is specific to their interests and includes updates from AOIA, Certifying Board Services, and Membership.
- Held a Public Policy Roundtable in October 2020 in partnership with the Department of Public Policy and AOIA with over 70 students, residents, and new physicians in practice registered for the event.
- The OMED Scholarship Program provided complimentary OMED registration for 20 residents and fellows for OMED 2020.
 - While this program is funded for 10 recipients for an in-person experience, last year's virtual platform provided an opportunity to increase the program's reach while staying significantly within budget.
 - The BEL will track metrics year-over-year to measure the effectiveness of this program in retaining the recipients' AOA membership and their attendance at future OMED conferences.
- The 2021 DO Day Scholarship Program, in collaboration with AOIA, provided complimentary DO Day registration and AOA membership for one year to its recipients.
- Submitted resolutions to the AOA Board of Trustees that were approved to go to the House of Delegates, including:
 - Clarifying the definition of a new physician in practice in the AOA Constitution;
 - Advocating for appropriate personal protective equipment; and
 - Supporting for the inclusion of an optional pronoun demographic question on general medical education applications.

Bureau of Membership

- Launched successful membership campaigns, including better communication of the AOA's member value proposition, capitalizing on recent success in professional and legislative advocacy efforts.
- Developed a targeted marketing plan for recruitment and retention of resident and fellow members.
- Provided governance oversight with respect to membership services, dues structure and fees, and the annual membership renewal processes.
- Completed vendor selection for new association management system and member mobile app, with implementation of both already underway.
- Exceeded the FY21 membership revenue budget, and started FY22 with \$768,000 in additional revenue due to deferral of membership dues paid late in the fiscal year.

Ethics Subcommittee of the Bureau of Membership

- The Ethics Subcommittee meets on an ad hoc basis to review complaints about ethical misconduct on the part of AOA members or to review questions about ethics issues referred by the AOA President or Board of Trustees
- This past year, the Ethics Subcommittee transitioned from a subcommittee of the Bureau of Membership to a subcommittee of a new Committee – the Ethics Review and Board Appeals Committee.

Report of the Department of Professional Affairs
Richard R. Thacker, DO, Chair
July 16, 2021

- This past year, the Ethics Subcommittee reviewed and adjudicated two complaints regarding alleged misconduct on the part of AOA members: one concerning appropriate handling of the termination of a physician-patient relationship; the other concerning public testimony. (The Subcommittee's deliberations are confidential.)

Committee on Awards

- The Committee on Awards confirmed a total of 18 AOA awards, including 15 newly established awards and forwarded these awards to the Board of Trustees for Approval.
- Newly established AOA awards are as follows: Advocacy Awards (5), Bob E. Jones, CAE Award, Journal of Osteopathic Medicine Awards (5), Outstanding Affiliate Awards (3) and the Unification Award.
- The committee confirmed recipients for the following AOA awards and forwarded names to the AOA Board of Trustees for Approval: Advocacy Awards (5), Bob E. Jones, CAE Award (2), Distinguished Service Award, Mentor of the Year Award and Northup Award.

Report of the Department of Research and Public Health
Robert W. Hostoffer, Jr, DO, Chair
July 16, 2021

This report covers the activities of the Department of Research and Public Health from July 2020 to June 2021.

Bureau of Osteopathic Research and Public Health (BORPH)

Public Health Activities

- BORPH made recommendations to the AOA Board of Trustees (BOT) to approve three public health initiatives which include the following.

1. Immunization promotion.

A letter from Thomas L. Ely, DO, AOA President and Robert Hostoffer, DO, Chair, AOA Department of Osteopathic Research and Public Health was sent to AOA members in December 2020 addressing the AOA's support of routine and emergent immunizations. The letter also included a list of resources and Vaccine Talking Points that physicians can use in discussions with patients.

2. Awareness of health disparities in minorities for COVID-19.

The BORPH Social Determinants of Health and Health Disparities (SDOH) Workgroup provided input on the development of an Osteopathic SDOH Patient Assessment Tool and a resource on Coding for SDOH ICD-10 Z codes, plus additional educational resources. After full BORPH review, the documents were compiled into a PDF toolkit for the annual report.

3. Integration of OMM/OPP into opioid addiction and treatment.

The BORPH workgroup on this issue discussed use of OMT in pain management and its impact as a non-pharmacological treatment. Staff submitted a grant with the Collaborative for REMS Education (CORE REMS) to fund CME programs/activities on use and abuse of opioids including education on non-pharmacological treatments. The grant announcement will be made in July 2021.

Research activities

- BORPH made recommendations to the AOA BOT to approve three focus areas for Research. These include:
 - OMM/OMT on the Prevention and Management of Musculoskeletal Injuries.
 - Acute/Chronic Pain Management.
 - The Impact of the Osteopathic Approach on Chronic Disease and Elderly Care.

The Focus Area Task Forces revised three Requests for Applications (RFAs) based on these focus areas to post on the AOA website. Additional RFAs posted include RFAs for Osteopathic Medical Students, Physicians-in-Training, and New Investigators (co-sponsored with the American Osteopathic Foundation).

- Additionally, BORPH introduced a new RFA to address Osteopathic Manipulative Medicine (OMM) Observational and Explorative Research Studies. These grants support investigations of the successful effects of OMM on disease and can be retrospective or prospective studies. To generate

Report of the Department of Research and Public Health
Robert W. Hostoffer, Jr, DO, Chair
July 16, 2021

more applications, this RFA was revised to add 14 focused hypotheses developed by BORPH to address the impact of OMM on various diseases.

- The Bureau awarded five research grants this year: two in the research focus area of Acute and Chronic Pain Management and one in the research focus area on the Impact of the Osteopathic Approach on Chronic Disease and Elderly Care. Additional grants were awarded for the RFA addressing Osteopathic Manipulative Medicine (OMM) Observational and Explorative Research Studies and the RFA for New Investigators.

Additional submissions for the RFA addressing Osteopathic Manipulative Medicine (OMM) Observational and Explorative Research Studies are currently under review. Grant awards will be announced in August 2021.

Policy Review

- BORPH reviewed and made recommendations to 32 sunset policies for the 2021 House of Delegates (HOD) meeting. The Bureau's responses included updates to the policy on Human Immunodeficiency Virus (HIV) in support of osteopathic physicians and medical students advocating for the removal of legal and systemic barriers to allow patients living with HIV to access care, and to allow healthcare workers living with HIV to provide care to their patients.

The Bureau also recommended revisions to the policy increasing the categories on Expanding Gender Identity Options on Physician Intake Forms to request that patients indicate both their sex at birth (male, female, intersex) and gender identity (male, female, transgender male, transgender female, genderqueer, and an additional category with a blank space for the patient to complete). This revision would provide options that are more inclusive and open for patients, provide education on the options for physicians, and be more in line with current nomenclature.

American Osteopathic Association

House of Delegates

Committee on Rules & Order of Business

Jeff Dunkelberger, DO, Chair

July 17, 2021
A/2021

Mr. Speaker, the Committee on Rules & Order of Business met on July 17, 2021, to consider late resolutions.

Mr. Speaker, I present the following Consent Agenda, and the Committee recommends that the House of Delegates APPROVE the following late resolutions for consideration and action by the 2021 AOA House of Delegates:

H-343 WHITE PAPER - IMPROVING ACCESS TO PHYSICIAN-LED CARE

H-344 WHITE PAPER - REFORMING THE HEALTH IT LANDSCAPE TO
IMPROVE THE PATIENT AND CLINICIAN EXPERIENCE

Explanatory Statement:

The White Papers at issue in H-343 and H-344 were approved by the AOA Board of Trustees at its meeting on July 13, 2021. Therefore, the resolutions calling for approval of the White Papers could not be submitted for consideration by the House of Delegates until this time.

And I so move.

Mr. Speaker, the Committee also discussed and reviewed the Rules for the Virtual House of Delegates (2021) and recommends that it be accepted as the handbook of the methods and rules under which this 2021 House operates.

And I so move.

Mr. Speaker, this concludes the Committee's report. I would like to thank the members of the Committee.

Committee Members:

Jeff Dunkelberger, DO - Chair	Oklahoma
Katherine H. Eilenfeld, DO	Ohio
Jone Geimer-Flanders, DO	Hawaii
Paul R. Rennie, DO	AAO
Catherine E. Bernardini, DO	ACCOG

STAFF

Joshua Prober, JD
Dawn Amaskane

American Osteopathic Association

House of Delegates

Report of the Joint Board /House Budget Review Committee

Ronald R. Burns, DO, Chair
Teresa Hubka, DO, Vice Chair

July 16, 2021
A/2021

Mr. Speaker, the Finance Committee convened on May 19, 2021.

- The members approved the AOA FY2022 Operating Budget Report with a fiscal impact of \$217,923
- and the AOA FY2022 Capital Expenditures Budget Report with a fiscal impact of \$4,113,638

Mr. Speaker, the Joint Board/House Budget Review convened on July 13, 2021.

- The members accepted the AOA FY2021 Operating Budget Report with a fiscal impact of \$217,923
- and the AOA FY2021 Capital Expenditures Budget Report with a fiscal impact of \$4,113,638
- The members accepted the Report of the Strategic Planning Committee

Additionally, an open forum is scheduled during the reference committee time to receive comments.

Mr. Speaker, this concludes my report and I would like to take this opportunity to thank the members of both the Finance Committee and the Joint Board/House Budget Review Committee.