



102nd Annual Meeting of the Board of Trustees General Session and House of Delegates Annual Meeting

Chicago Marriott Downtown Magnificent Mile Hotel, 540 N. Michigan Avenue, Chicago, IL 60611

All times listed below are Central Time.

**Subject to Change*

Thursday, July 14, 2022		
Time	Event	Location
8 – 9 am	Board of Trustees Breakfast <i>(All Invited)</i>	Marriott, Chicago E, 5 th Flr
9 am – 12 pm	Board of Trustees General Session Meeting	Marriott, Chicago A-D, 5 th Flr Zoom (Virtual Participation)
12 – 1 pm	Board of Trustees Lunch <i>(All Invited)</i>	Marriott, Chicago E, 5 th Flr
1 – 3 pm	Board of Trustees General Session Meeting	Marriott, Chicago A-D 5 th Flr Zoom (Virtual Participation)

To view the AOA House of Delegates meeting virtually through a live stream, please complete the registration information below.

Important Note: this option provides the ability for interested members to **only view** the deliberations of the House of Delegates.

[2022 HOD Virtual Participation Registration Form - Formstack](#)

Friday, July 15, 2022		
Time	Event	Location
8 – 8:30 am	HOD Delegate Orientation	Marriott, Chicago E, 5 th Flr
9 am – 12 pm	House of Delegates Meeting	Marriott, Grand Ballroom, 7 th Flr
12 – 12:45 pm	HOD Reference Committee Chairs Meeting	Marriott, Chicago D, 5 th Flr
1:30 – 4:30 pm	HOD Reference Committee Meetings Ad Hoc Committee Committee on Constitution and Bylaws Committee on Educational Affairs Committee on Professional Affairs Committee on Public Affairs Committee on Resolutions Joint Board / House Budget Review	Marriott Indiana, 6 th Flr Northwestern, 6 th Flr Avenue Ballroom, 4 th Flr Clark, 4 th Floor Addison, 4 th Floor Kane, 3 rd Floor Sheffield, 4 th Floor
5 – 5:30 pm	VIP McDevitt Circle / Premier Club OPAC Reception	Marriott, Chicago D, 5 th Flr
5:30 – 6:30 pm	Chairman’s Club Reception	Marriott, Chicago D, 5 th Flr

Saturday, July 16, 2022		
Time	Event	Location
7:30 – 8 am	House of Delegates Meeting (Nominations)	Marriott, Grand Ballroom, 7 th Flr
8 – 10:30 am	House of Delegates Meeting (Reference Committee Reports)	Marriott, Grand Ballroom, 7 th Flr
11 am	AT Still Memorial Lecture and AT Still Bust Presentation	Marriott, Grand Ballroom, 7 th Flr
11:45 am – 12:15 pm	2022 AOA Awards Presentation OPAC Awards Presentation	Marriott, Grand Ballroom, 7 th Flr
12:15 – 1:30 pm	Lunch on own	
1:30 – 3 pm	House of Delegates Meeting (Reference Committee Reports)	Marriott, Grand Ballroom, 7 th Flr
4 – 5 pm	Inaugural Speech of the 2022 / 2023 AOA President	Marriott, Grand Ballroom, 7 th Flr
6:30 – 9:30 pm	Presidential Reception	Marriott, Chicago, 5 th Flr



102nd Annual Meeting of the Board of Trustees General Session and House of Delegates Annual Meeting
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Subject to Change

Sunday, July 17, 2022		
Time	Event	Location
7:30 am – 12 pm	House of Delegates Meeting (Elections / Reports)	Marriott, Grand Ballroom, 7 th Flr



102nd House of Delegates Annual Meeting
Friday, July 15, 2022
9 am – 12 pm CT

9 am	Call to Order and Welcome	Ray L. Morrison, DO, Speaker, House of Delegates
	Presentation of Colors	Emerald Society / Chicago Police Department
	Flag Bearers	Courtney Merlo, OMS IV, National President, Student Osteopathic Medical Association (SOMA)
		Alexis Ruffing, OMS III, Legislates Affairs Representative, Council of Osteopathic Student Government Presidents (COSGP)
	Pledge of Allegiance	Sherri L. Quarles, President, Society of Osteopathic Specialty Executives (SOSE)
	National Anthem	VCOM S.O.A.P. Notes
	Presentation of Colors Concludes	Emerald Society / Chicago Police Department
	Memorial Observance	Ray L. Morrison, DO, Speaker, House of Delegates
	Invocation	Ronald R. Burns, DO, AOA Past President – 123 rd
	Osteopathic Pledge of Commitment	Ray L. Morrison, DO, Speaker, House of Delegates
9:20 am	Credentials Committee Report	Scott S. Cyrus, DO, Chair Mark E. Eastman, DO, Vice Chair
9:25 am	Colleges of Osteopathic Medicine Presentation	Ray L. Morrison, DO, Speaker, House of Delegates
9:30 am	Greetings from Illinois Osteopathic Medical Society	Kim Huntington-Alfano, DO, President



102nd House of Delegates Annual Meeting
Friday, July 15, 2022
9 am – 12 pm CT

9:35 am	Introductory Comments <ul style="list-style-type: none">▪ AOA Past Presidents▪ 2021/2022 AOA Board of Trustees▪ Student & Resident Acknowledgement▪ Guests▪ Pages	Ray L. Morrison, DO, Speaker, House of Delegates
9:45 am	Advocates of the American Osteopathic Association (AAOA)	Shane Halvorsen, President
9:55 am	HOD Committee on Rules and Order of Business	Jeffery J. Dunkelberger, DO, Chair Kenneth A. Heiles, DO, Vice Chair
10:00 am	Approval of HOD Reference Committees and Assignments	Ray L. Morrison, DO, Speaker, House of Delegates
10:05 am	2021 / 2022 AOA Presidential Address	Joseph A. Giaimo, DO, MACOI, President
10:25 am	Meeting Break	
	Reports of the American Osteopathic Association	
10:35 am	Chief Executive Officer's Report	Kevin M. Klauer, DO, EJD, CEO
10:50 am	AOA Financial Report	Thomas L. Ely, Chair, Finance Committee
11:00 am	<u>2021 / 2022 Departmental Chair Reports*</u> Affiliate Relations Education Finance Governmental Affairs Membership Research and Public Health	Shannon C. Scott, DO, Chair Robert W. Hostoffer, DO, Chair James M. Lally, DO, Chair Richard R. Thacker, DO, Chair Sonia Rivera-Martinez, DO, Chair Bruce A. Wolf, DO, Chair
11:45 am	JOM Editor in Chief Report	Ross D. Zafonte, DO, Editor in Chief
11:50 am	Meeting Recess (OPAC & AOIA)	Ray L. Morrison, DO, Speaker, House of Delegates
11:55 am	AOA Staff Recognition	Ray L. Morrison, DO, Speaker, House of Delegates
12:05 pm	OMED 2022 Update	Ross D. Zafonte, DO, 2022 Program Chair



102nd House of Delegates Annual Meeting
Friday, July 15, 2022
9 am – 12 pm CT

12:10 pm HOD Process Ray L. Morrison, DO, Speaker, House of Delegates

12:15 pm **Meeting Recess**
*(Lunch with Reference Committee
Chairs/Members)*

* [Written Departmental Chair Reports](#)

1:30 - **HOD Reference Committee Meetings**

4:30 pm

Committee on Educational Affairs (200 Series)	Avenue Ballroom, 4 th Floor
Committee on Professional Affairs (300 Series)	Clark, 4 th Floor
Committee on Public Affairs (400 Series)	Addison, 4 th Floor
Committee on Constitution & Bylaws (500 Series)	Northwestern/Ohio/Purdue, 6 th Floor
Ad Hoc Committee (600 Series)	Indiana/Iowa/Michigan, 6 th Floor
Joint Board/House Budget Review Committee	Sheffield, 4 th Floor
Committee on Resolutions	Kane, 3 rd Floor



102nd House of Delegates Annual Meeting
Saturday, July 16, 2022
7:30 am – 3 pm CT | 4 – 5 pm CT

7:30 am	Call to Order / Reconvene Meeting	Ray L. Morrison, DO, Speaker, House of Delegates
7:35 am	Credentials Committee Report	Scott S. Cyrus, DO, Chair Mark E. Eastman, DO, Vice Chair
7:40 am	Nominations: AOA Officers, Board of Trustees, Officers of the House of Delegates	Ray L. Morrison, DO, Speaker, House of Delegates
	<u>AOA Officers</u>	
	▪ President-Elect	(one year term / 2023)
	▪ First Vice President	(one year term / 2023)
	▪ Second Vice President	(one year term / 2023)
	▪ Third Vice President	(one year term / 2023)
	<u>AOA Board of Trustees</u>	
	▪ Name (expired term / 2022)	(three-year term / 2025)
	▪ Name (expired term / 2022)	(three-year term / 2025)
	▪ Name (expired term / 2022)	(three-year term / 2025)
	▪ Name (expired term / 2022)	(three-year term / 2025)
	▪ Name (expired term / 2022)	(three-year term / 2025)
	▪ Name (expired term / 2022)	(three-year term / 2025)
	▪ New Physician in Practice	(one year term / 2023)
	▪ Postdoctoral Trainee	(one year term / 2023)
	▪ Student	(one year term / 2023)
	<u>Officers of the House of Delegates</u>	
	▪ Ray L. Morrison, DO, Speaker of the House	(one year term / 2023)
	▪ David L. Broder, DO, Vice Speaker of the House	(one year term / 2023)
8:00 am	Meeting Recess (AOIA Election & OPAC)	
8:15 am	Meeting Reconvenes	Ray L. Morrison, DO, Speaker, House of Delegates
8:20 am	HOD Committee on Rules and Order of Business	Jeffery J. Dunkelberger, DO, Chair Kenneth A. Heiles, DO, Vice Chair



102nd House of Delegates Annual Meeting
Saturday, July 16, 2022
7:30 am – 3 pm CT | 4 – 5 pm CT

8:25 am	House of Delegates Reference Committee Reports	Ray L. Morrison, DO, Speaker, House of Delegates
	▪ Ad Hoc	Jennifer L. Gwilym, DO, Chair Gail D. Feinberg, DO, Vice Chair
	▪ Constitution and Bylaws	Linda F. Delo, DO, Chair Elizabeth A. Palmarozzi, DO, Vice Chair
9:30 am	Meeting Break	
9:45 am	Meeting Reconvenes	Ray L. Morrison, DO, Speaker, House of Delegates
9:50 am	House of Delegates Reference Committee Reports	Ray L. Morrison, DO, Speaker, House of Delegates
	▪ Constitution and Bylaws	Linda F. Delo, DO, Chair Elizabeth A. Palmarozzi, DO, Vice Chair
	▪ Educational Affairs	Thomas J. Mohr, DO, Chair Lori A. Kemper, DO, Vice Chair
11:00 am	Special Order of Business	Ray L. Morrison, DO, Speaker, House of Delegates
	2022 A.T. Still Memorial Lecture	Robert S. Juhasz, DO
	American Osteopathic Foundation Report	Barbara Ross-Lee, DO, President, American Osteopathic Foundation
	2022 A.T. Still Medallion Presentation	Barbara Ross-Lee, DO, President, American Osteopathic Foundation
11:35 am	OPAC Awards Presentation	Ronnie B. Martin, DO, Chair, OPAC
	▪ James Lally, DO, Student Scholarship Recipient	
	▪ Oliva Circle Award Recipient	
11:40 am	AOA Awards Presentation	Joseph A. Giaimo, DO, MACOI, President
	▪ Bob E. Jones, CAE Award	
	▪ Distinguished Service Award	
	2022 Presidential Citations	Joseph A. Giaimo, DO, MACOI, President
12:15 pm	Meeting Recess	



102nd House of Delegates Annual Meeting
Saturday, July 16, 2022
7:30 am – 3 pm CT | 4 – 5 pm CT

1:30 pm	House of Delegates Reference Committee Reports	Ray L. Morrison, DO, Speaker, House of Delegates
	<ul style="list-style-type: none"> ▪ Educational Affairs 	Thomas J. Mohr, DO, Chair Lori A. Kemper, DO, Vice Chair
	<ul style="list-style-type: none"> ▪ Professional Affairs 	Stephen R. Bell DO, Chair John J. Kalata, DO, Vice Chair
	<ul style="list-style-type: none"> ▪ Public Affairs 	Lisa A. Witherite-Rieg, DO, Chair Andrew D. Adair DO, Vice Chair
3:00 pm	Meeting Recess	
4:00 pm	Meeting Resumes	Ray L. Morrison, DO, Speaker, House of Delegates
	Inauguration of 2022-2023 AOA President Ernest R. Gelb, DO	
5:00 pm	Meeting Recess	Ray L. Morrison, DO, Speaker, House of Delegates
6:30 pm	Reception Honoring the 126th AOA President Ernest R. Gelb, DO	



102nd House of Delegates Annual Meeting
Sunday, July 17, 2022
7:30 am CT – End of Business

7:30 am	Call to Order / Reconvene Meeting	Ray L. Morrison, DO, Speaker, House of Delegates
7:35 am	Credentials Committee Report	Scott S. Cyrus, DO, Chair Mark E. Eastman, DO, Vice Chair
7:40 am	Election: AOA Board of Trustees and Officers	Ray L. Morrison, DO, Speaker, House of Delegates Kevin M. Klauer, DO, EJD, Secretary
8:00 am	Meeting Recess <i>(AOIA Elections)</i>	Ray L. Morrison, DO, Speaker, House of Delegates
8:15 am	Meeting Reconvenes	Ray L. Morrison, DO, Speaker, House of Delegates
8:20 am	House of Delegates Reference Committee Reports	Ray L. Morrison, DO, Speaker, House of Delegates
	<ul style="list-style-type: none"> ▪ Joint Board / House Budget Review Committee 	Thomas L. Ely, DO, Chair Robert G. G. Piccinini, DO, Vice Chair
	<ul style="list-style-type: none"> ▪ Committee on Resolutions 	David K. Best, DO, Chair Anna Z. Hayden, DO, Vice Chair
	Old Business	Ray L. Morrison, DO, Speaker, House of Delegates
	Meeting Adjournment	Ray L. Morrison, DO, Speaker, House of Delegates

Advocates for the AOA

Shane Halvorsen, President



The Mission and Purpose of The Advocates for the AOA

- Our mission is to support and promote the osteopathic profession. Our Advocate network is vast, ranging from physicians to friends to office staff. We cover the globe, creating a strong, close network of people who understand that osteopathic medicine offers the best type of medical care possible.





Goals for 2022

1. Commitment to our strategic plan to implement remote programs for our mid-stage and student/resident members
2. Partnerships with AOF/ AOA/ SOMA/ Mental Health
3. Create new partnerships with COMs and SAA presidents
4. OMED 2022 Fun Run

Outcomes

- Increased communication uniformity with use of “Advocate” more prolifically
- Began quarterly network and connect calls with each of our state affiliate president and SAA presidents
- Fully vested funds with AOF
 - Donna Jones Moritsugu Award
 - Holiday Hug Grant
- Increased SAA programs for student and family support
- New Logo and commitment to many more years of hosting the Fun Run

Partnerships



SOMA Scholarships and
Special Projects



AMERICAN OSTEOPATHIC
FOUNDATION



Mental Health and
Awareness

Support for our Member Affiliate Groups

Quarterly Meeting: **National Council of State Advocate Leaders for the AAOA**

Quarterly Meeting: **National Council of Student and Resident Advocate Leaders for the AAOA**

- Discussion of successes and challenges
- Upcoming events and programs to be supported
- Create a greater bond among the state and national board, network, and find greater opportunities to work together and support one another

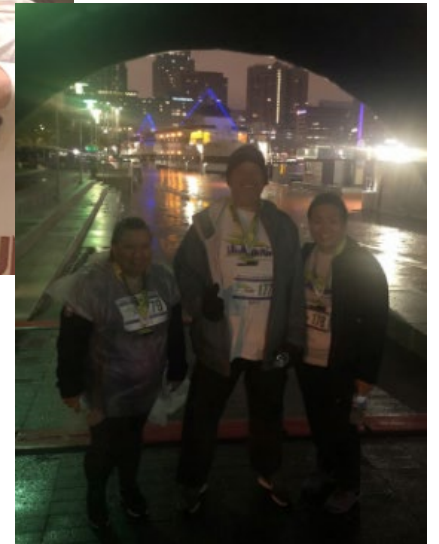


Student Advocates





Fun Run at OMED



Fun Run At OMED 2022 in Boston

- SOMA Scholarships
- Special Projects Annual Grants
- SAA Support Across the Country

- Family Fun Event hosted on Saturday
- SAA Luncheon



Appreciation for our AOA support system

- BIG Thanks to Dr. Giaimo, Dr. Gelb, Dr. Klauer, Dr. Garza, and Sarah Farmer
- We are honored to be affiliated with the AOA and all of the DO family. We are committed to representing and supporting the Osteopathic Profession with integrity and passion to the best of our ability. We will be Advocating with Action this year!





AMERICAN
OSTEOPATHIC
ASSOCIATION

Thank You

Shane Halvorsen, President





Report of the Department of Affiliate Relations
Shannon C. Scott, DO, Chair
July 2022

This report highlights activities of the Department of Affiliate Relations from August 2021 – June 2022.

Foster a collegial environment for affiliate leaders to provide input on critical issues being considered by the AOA BOT.

- Three BAR meetings were held this fiscal year (November 18, 2021, February 24, 2022, and May 11, 2022).
- BAR members were asked to share feedback and suggestions for enhancements related to OMED, the AOA's Midyear Meeting, DO Day, and the Affiliate Membership Recruitment and Retention Toolkit.
- In total, 13 Affiliate Town Halls on timely and relevant topics identified by affiliate leaders were held this fiscal year, an increase of 18% over the previous year. Average attendance at each town hall was 46 participants.

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

- President Giaimo and President-Elect Gelb attended BAR meetings as their schedules allowed.
- In addition, during monthly calls with BAR Chair Shannon Scott, DO, staff shared feedback from affiliate leaders pertaining to their concerns, activities, and service requests. Drs. Giaimo and Gelb participated in these calls.

Participate in the development of an affiliate leader educational program.

- Discussions were held during BAR meetings, input was provided via quarterly calls and town hall meetings, and surveys were fielded to obtain feedback on the most desired topics for affiliate leader educational programs.
- The Affiliate Leader Track debuted at OMED 2021. This inaugural program featured the following topics:
 - Board Orientation and Training: Roles, Relations and Roadmap.
 - Partnering for Success: Effective Strategies in Obtaining Grant Funding for Your Organization.
 - AOA CME Updates: News You Can Use.
 - Student Engagement: Orientation to Residency.
 - Expect the Unexpected: Ensuring Successful In-Person, Hybrid and Virtual Events.
 - The Secret to Recruiting, Engaging, and Retaining Members.
- A survey was conducted of affiliate leaders to determine the topics for the virtual affiliate track at DO Day 2022. The following sessions were developed as a result of the input gleaned from the survey:
 - A Deep Dive on the State Legislative Landscape.
 - Enhancing Your Association's Advocacy Program Through Collaboration.
 - A Deep Dive on the Federal Legislative Landscape.
 - Scope of Practice Campaign Planning.
 - Increasing Student and DO Engagement in State Advocacy.
 - Leveraging Advocacy to Enhance Member Value.



Report of the Department of Affiliate Relations
Shannon C. Scott, DO, Chair
July 2022

Evaluate and make recommendations for all affiliate-related award nominees to the Committee on Awards.

- The BAR presented its recommended slate of nominees for the Outstanding Affiliate Awards to the AOA Committee on Awards. Upon their approval and that of the full AOA BOT, the inaugural Outstanding Affiliate Awards were presented to the following three affiliates during OMED 2021: Michigan Osteopathic Association (MOA), American College of Osteopathic Family Physicians (ACOF), and American Osteopathic College of Radiology (AOCR).
- The BAR presented its recommended slate of nominees for the Bob E. Jones, CAE Award to the AOA Committee on Awards. Upon their approval and that of the full AOA BOT, the 2022 Bob E. Jones, CAE Award recipient is Suzanne Frederick, who will be recognized at the 2022 AOA House of Delegates.



Report of the Department of Educational Affairs
Robert W. Hostoffer, Jr., DO
July 2022

This report highlights the activities of the AOA Bureaus, Councils and Committees that report to the Department of Education Affairs from August 2021 – June 2022.

Commission on Osteopathic College Accreditation (COCA)

- The COCA received a five-year renewal of its recognition from the United States Department of Education, which is the longest recognition period granted by the Department.
- The COCA continued the process of applying for recognition from the World Federation for Medical Examiners (WFME).
 - The COCA submitted its full recognition application to the WFME for review and has responded to questions and requests for additional information from WFME representatives.
 - WFME representatives observed a COCA site visit in February 2022 and observed the COCA's May 2022 meeting where the site visit was reviewed.
- For the 2022–23 academic year, the COCA will accredit 38 colleges of osteopathic medicine (COMs) operating at 60 sites.
- One new COM will begin instruction in the 2022–23 academic year: the Kansas College of Osteopathic Medicine in Wichita, KS.
- The COCA continues to provide guidance to COMs on compliance with accreditation standards due to disruptions related to the COVID-19 pandemic, including the use of distance education.
- The COCA conducted 11 site visits virtually, 5 in-person site visits, and 1 hybrid site visit (combination of virtual and in-person) during the 2021–22 academic year.
- The COCA has been reviewing the work of its Diversity, Equity, and Inclusion Task Force as well as its Clinical Skills Task Force and will be publishing proposed amendments to its Standards this Summer for public comment.

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 response to the recommendations of the NBOME Special Commission on Osteopathic Medical Licensure Assessment.
- The BOE provided oversight on issues impacting graduate medical education by providing input to the AOA/ACGME/ABMS Transition to Practice and Transition to Fellowship Recommendations and AOA's organizational statements of the recommendations of the Coalition on Physician Accountability UME-to-GME Review Committee.
- The BOE provided oversight on issues impacting continuing medical education by providing input on the proposed definition of osteopathic CME, faculty and content requirements to the Task Force on Osteopathically Distinct CME.
- The BOE provided governance oversight to the Council on OMED and Program and Trainee Review Council.
- The BOE reviewed 2017 House of Delegates resolutions through its sunset review process.
- The BOE recommended nominees to the NRMP Board of Directors, ACGME Board of Directors, National Academy of Medicine Fellowship in Osteopathic Medicine, NBOME Student Experience Panel, and ACGME Review Committees.



Report of the Department of Educational Affairs
Robert W. Hostoffer, Jr., DO
July 2022

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 distributed a survey 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 of OMED

- The Council of OMED provided governance oversight with respect to the annual OMED conference in 2021.
- While originally planned as hybrid meeting, the AOA Board of Trustees decided to host the conference virtually due to the COVID-19 surge of the delta variant.
- The Council of OMED provided a report to the Board of Trustees and the Bureau of Osteopathic Education following the conference, reporting the following:
 - 17 specialty colleges participated in OMED 2021.
 - Final registration was 5,730 attendees - a 48% increase from 2020. Of these attendees, 3,498 were DOs.
 - A record number of medical students and residents attended as a decision was made to make their registrations complimentary.
 - 1,619 medical students (210% increase over 2020).
 - 276 residents (886% increase over 2020).
- The Council participated with AOA leadership in the selection of keynote speakers.
- Additionally, the Council is providing governance oversight to OMED 2022 which will be launched as a hybrid, three-day conference. The in-person portion will be held Oct. 27-30 in Boston, MA. 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.



Report of the Department of Educational Affairs
Robert W. Hostoffer, Jr., DO
July 2022

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 48 subspecialties. The full BOS convened for its Annual meeting in October 2021 and for its Midyear meeting in April 2022.
- The 2022-2024 AOA Board Certification CME Requirements were approved by the BOS at its 2021 Annual meeting.
- Revisions to the Handbook of the Bureau of Osteopathic Specialists (BOS) were approved for submission to the AOA Board of Trustees for final approval at its 2022 Midyear Meeting.
- The BOS Executive Committee acts on behalf of the full BOS between meetings and convenes monthly. The BOS Executive Committee reported its activities and actions from July 2021 through March 2022 to the full BOS at the 2021 Annual and 2022 Midyear meetings. The activities and actions of the BOS Executive Committee were approved by the full BOS.
- The Standards Review Committee established recommendations and requirements for the development of Longitudinal Assessment (LA) models for Component 3 of the Osteopathic Continuous Certification (OCC) process.
- The LA recommendations and requirements were distributed to each AOA Specialty Certifying Board with the expectation that all boards will be fully compliant with the LA recommendations and requirements before or by the start of the next three-year OCC cycle on January 1, 2025.



Report of the Finance Department
James M. Lally, DO, Chair
July 2022

This report highlights activities of the Finance Department from August 2021 to June 2022.

FY22 - another unusual year where COVID restrictions were lifted in the second half of the year.

- Overall, great operational results.
- Good net results due to stock market performance.
- The unaudited and preliminary operating surplus for this fiscal year is \$6.4 million.
- Reserves were \$53.6 million at May 31, 2021 and projected to be \$57.4 million at May 31, 2022. This is a reserve percentage of 231.2% of required reserves. As a reminder, the required reserve is 75% of operating expenses from two years earlier.
- Certifying Board Services and OMED results were very positive.
- Travel and meeting expenses were drastically reduced, staff vacancies contributed to the lower expenses.
- We approved a balanced AOA FY 2023 Operating Budget in FY2022.
- We approved the AOA FY2023 Capital Budget in FY2022.
- We approved the AOA FY2023 142 E Ontario Budget in FY2022.
- We approved a new audit firm – Marcum LLP for the upcoming audit for FY2022 and the plan is to review and approve the audit at our October meeting at OMED.
- We implemented a new automated accounts payable system – Concur and signed up for a new accounting system – Sage Intacct, both Cloud-based.
- Looking ahead, FY2023 will be a challenging year for AOA.



Report of the Department of Governmental Affairs
Richard R. Thacker, DO, Chair
July 2022

This report highlights the activities of the Department of Governmental Affairs from August 2021 to June 2022.

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; two of which were joint meetings with the Council on Economic and Regulatory Affairs and Council on State Health Affairs. Meetings included discussions on AOA policy and issues impacting osteopathic physicians and medical students, and presentations from outside speakers, including members of Congress and senior Congressional 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 three dozen grassroots advocacy campaigns and more than 25 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:
 - Preventing a major cut to Medicare payment rates. Going in to 2022, physicians were facing a series of cuts that cumulatively would have been a 9.75% cut to Medicare payment rates. Through a series of efforts, the AOA helped block an across-the-board cut of 9% from taking effect on January 1, 2022.
 - An extension of temporary telehealth coverage provisions for six months after the end of the public health emergency.
 - Enactment into law of the Dr. Lorna Breen Health Care Provider Protection Act.
 - The adoption of Senate Resolution 595, designating the week of April 18 through April 24 as National Osteopathic Medicine Week.
- Lastly, the BFHP reviewed and submitted resolutions for 37 Sunset Policies for the 2022 House of Delegates, 10 of which the bureau recommended for amendment.



Report of the Department of Governmental Affairs
Richard R. Thacker, DO, Chair
July 2022

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 four meetings this year in addition to the joint bureau and council meetings. 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, , payment rules on COVID-19 vaccine administration, and opioid prescribing guidelines 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, and appropriate payment for COVID-19 vaccine administration.
- 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), which was included in the final CY 2022 Medicare Physician Fee Schedule.
- Lastly, the CERA reviewed and submitted resolutions for 19 Sunset Policies 2022 House of Delegates, 4 of which the bureau recommended for amendment.

Council on State Health Affairs

- This year the council 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 meetings. 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.



Report of the Department of Governmental Affairs
Richard R. Thacker, DO, Chair
July 2022

- 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 AOA collaboration with osteopathic affiliates on 23 letters and 14 grassroots alerts 16 states this past year. So far, these activities have resulted in 10 wins and 5 in losses, with the remainder outstanding until those states adjourn for the year. State government affairs successes this past year include:
 - Scope of practice legislation failing to advance in five states.
 - Interstate Medical Licensure Compact legislation being enacted in two states.
 - Securing changes to Improve Osteopathic physician licensing regulations in two states.
 - Enactment of legislation establishing one state's bone marrow donor registry program.
- Lastly, the CSHA reviewed and submitted resolutions for 25 Sunset Policies for the 2022 House of Delegates, including 5 Sunset Policies that the council recommended for amendment.



Report of the Department of Membership
Sonia Rivera-Martinez, DO, Chair
July 2022

This report highlights activities of the Department of Membership from August 2021 to June 2022.

Bureau of Emerging Leaders (BEL)

- In addition to the 16 members appointed to the Bureau of Emerging Leaders (BEL), there are six additional osteopathic medical students, residents, fellows, and new physicians in practice engaged with the BEL's work.
- The BEL has collaborated with AOA departments on a variety of programs and initiatives, providing input on member value services, board certification, the AOA mobile app, OMED topics, and presenting at OMED 2021.
- The BEL continues its collaboration with SOMA and COSGP, including participating in a leadership panel at SOMA's 2022 Summer Leadership Meeting.
- Advocacy
 - Held a Public Policy Roundtable in April 2022 in partnership with the Department of Public Policy with over 110 students, residents, fellows, and new physicians in practice registered for the event.
- Communications
 - Released four quarterly newsletters to 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.
- Resolutions
 - Submitted resolutions to the AOA Board of Trustees that were approved to go to the House of Delegates, including:
 - Advocating for equality in away rotations/sub-internships for osteopathic medical students and
 - Reaffirming the definition of a new physician in practice.
- Scholarships
 - The 2021 OMED Scholarship Program provided complimentary conference registration for four residents and fellows along with a personalized itinerary of sessions that provided a well-rounded overview of OMED's offerings.
 - The 2022 DO Day Scholarship Program, in collaboration with AOIA, provided complimentary DO Day registration and travel reimbursement to two recipients, along with an exclusive virtual opportunity to network with AOA leadership prior to DO Day.
 - The BEL will continue to track metrics year-over-year to measure the effectiveness of its scholarship programs in retaining the recipients' AOA membership, AOA board certification status, and attendance at future OMED and DO Day conferences.



Report of the Department of Membership
Sonia Rivera-Martinez, DO, Chair
July 2022

Bureau of Membership (BOM)

- Provided governance oversight with respect to membership services, dues structure and fees, and the annual membership renewal processes. To support our affiliates, the AOA began recruiting new members for our specialty colleges in addition to our state osteopathic association on its dues invoices, leading to a successful year of over \$200,000 in new member dues for the year. The bureau also conducted a review of AOA's membership categories, and is recommending the elimination of the Honorary member category via resolution.
- Membership renewal was also streamlined, with the implementation of email marketing campaigns for more proactive outreach of AOA's member benefits. Campaigns targeted at former members were also implemented, also with the rollout of GME program membership for our residents and fellows.
- The My AOA mobile app was introduced to attendees at OMED21 and launched to the osteopathic community in January. There are over 2300 users of the app to date. In April, a Strategic Advisory Group for the app, comprised of DOs, students and AOA staff was formed to provide leadership and oversight so that the app remains current with relevant resources.
- Exceeded the FY22 13.9 million membership revenue budget beyond the \$768,000 dues revenue deferred from FY21.

Bureau of International Osteopathic Medicine (BIOM)

- The bureau continues its work with the help of Chair Teresa A. Hubka, DO, 13 Bureau members, and one Advisor position. AOA International Affairs staff continues to provide support to the Bureau.
- The Bureau collaborated with ACOFP during OMED 2021 and held a lecture on "Telemedicine in the Time of COVID – Comparing the Use of Telemedicine in the US to Other Countries" featuring physicians from Mexico, South Korea, the United Kingdom and the United States. The session was viewed over 1,000 times.
- The BIOM also sponsored its annual international health student abstract competition during OMED, which included two categories: Research (abstracts of IRB-approved research projects in international settings) and Narrative Medicine (creative nonfiction essays on the experience of illness, healing, and clinical practice).

The first and second place winners in each category will present their abstract, as will the overall winner. The competition was announced on May 15th and the winners will be notified by August 20th.

Best Overall Winner:

Margaret Dengal, OMS III, from ATSU-SOMA for her abstract "Prevalence of Osteopathic Manipulative Treatment (OMT) Usage During Global Health Outreach Trips to Rural Guatemala."

Research Abstract Category:

First Place (\$750 prize): Weston Burrup, OMS III, from ATSU-SOMA, for his abstract, "Maximizing Medical Outreach Efforts in Rural Guatemala: An Analysis of Disease Prevalence in Two Communities."



Report of the Department of Membership
Sonia Rivera-Martinez, DO, Chair
July 2022

Second Place (\$500 prize): Alexandra Skoczek, OMS II, from Edward Via COM, for her abstract, “Testimonials from Multinational Medical School Students in the Face of the COVID-19 Pandemic: A Global Health Approach.”

Narrative Medicine Essay Category:

First Place (\$750 prize): Ruchica Chandnani, OMS II, from ARCOM, for her essay, “The Universal Waiting Game for Getting Medical Care?”

Second Place (\$500 prize): Sarthak Parikh, OMS III, from NSU-KPCOM, for her essay, “Dance In Medicine.”

- The Bureau is collaborating again with ACOFP to present a session at OMED 2022 on [Project ECHO](#). The [annual abstract competition](#) will open on July 5th.
- The Bureau also convened a working group of relevant stakeholders to strengthen the connection between Canadian students enrolled at COMs, and between these students and our International Affiliate, the Canadian Osteopathic Association (COA). There is now a channel through which the Canadian students across COMs are connected, and the COA has established a free student membership category. Bureau leadership is also working with AOA leadership on the issue of USDO licensure in Canada.



Report of the Department of Research and Public Health
Bruce A. Wolf, DO, Chair
July 2022

This report covers the activities of the Department of Research and Public Health from August 2021 to June 2022.

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 and vaccine hesitancy. In collaboration with Strategic Partnerships and Health Initiatives, the following activities were completed.
 - a. **AOA Flu Prevention Toolkit** – An AOA Flu Prevention Toolkit was developed and provides information and resources to osteopathic physicians and their teams to address flu prevention and vaccine hesitancy. Components of the toolkit include influenza resources and tools for physicians and practices, patient education materials, and recent articles and influenza data. Talking points for osteopathic physicians on issues that patients express around vaccine hesitancy are also components of the toolkit. The toolkit is posted on osteopathic.org at [AOA Flu Prevention Toolkit](#).
 - b. **Primary Care Physicians Addressing COVID-19 Vaccine Hesitancy Initiative** – The goal of the initiative is to enhance osteopathic physicians' and their teams' knowledge, skills, and practice in partnering with their patients to reduce COVID-19 vaccine hesitancy. The AOA is targeting areas in select states where there is a high rate of vaccine hesitancy, particularly in underserved and under-immunized populations. Five AOA state affiliate organizations are partnering in this work including Florida, Michigan, Ohio, Oklahoma, and Pennsylvania. One of the activities was to develop content for Facts on Vax website pages on osteopathic.org with information and resources on how to talk to patients about COVID-19 vaccine hesitancy. This information is posted on osteopathic.org at [Facts on Vax - American Osteopathic Association](#).
 2. Awareness of social determinants of health (SDOH) and health disparities in minorities. The BORPH collaborated with Strategic Partnerships and Health Initiatives to complete the following activities this year.
 - a. **AOA Social Determinants of Health Physician Toolkit** – The [AOA SDOH Physician Toolkit](#) includes information on key issues to consider when incorporating SDOH assessment and a referral system into a DO's practice including:
 - i. The importance of training practice staff on working as a team to identify SDOH with patients.
 - ii. Addressing the workflow of the team and the role of each staff person.



Report of the Department of Research and Public Health
Bruce A. Wolf, DO, Chair
July 2022

- iii. The use of appropriate SDOH assessment tools and resources.
 - iv. Having a list of providers and community programs that patients can be referred to that address their specific needs.
 - v. Addressing how a practice can get paid for these services.
 - b. **OMED21 Social Determinants of Health Track** - A SDOH educational program track was planned and implemented at OMED21. The sessions focused on implementing components of the SDOH physician toolkit in osteopathic physician practices and working with minority communities on addressing SDOH.
3. Mental health aspects of wellness.
 - a. Patient mental health (part of SDOH). A focus on mental and behavioral health is inclusive in the SDOH efforts described above. Below are additional activities accomplished this year through Strategic Partnerships and Health Initiatives.
 - i. **Behavioral Health Initiative Collaborative** - The AOA is a partner in the Behavioral Health Initiative (BHI) Collaborative. The BHI Collaborative is a partnership among eight of the nation's leading physician organizations and is dedicated to equipping physicians and their practices with the necessary knowledge to sustain a whole-person, integrated and equitable approach to physical, mental and behavioral health. This year, AOA staff and experts participated in developing a webinar series, educational resources, and a practice team quality improvement project addressing mental/behavioral health of patients.
 - ii. **Affiliate News** – Content was published in *Affiliate News* on current data on the mental health of the US population highlighting specific high-risk groups. Funding opportunities related to addressing mental and behavioral health with patients were also included in *Affiliate News* this year
 - b. Physician, resident, student mental health and wellness.
 - i. **Osteopathic Physician and Medical Student Wellness Toolkit** - The BORPH developed an Osteopathic Physician and Medical Student Wellness Toolkit to address this Public Health Initiative. Web pages will be added to the AOA website in the next few months. The Toolkit is divided into four sections:
 - Developing and maintaining wellness throughout the life cycle of an osteopathic physician.
 - Recognizing the signs of burnout.
 - Identifying the warning signs of depression and suicidal ideation.
 - Resources and tools to address burn-out, depression, and suicidal ideation.



Report of the Department of Research and Public Health
Bruce A. Wolf, DO, Chair
July 2022

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.
- In addition to the three Requests for Applications (RFAs) related to the focus areas, an additional RFA on Osteopathic Manipulative Medicine (OMM) Observational & Explorative Focused Hypotheses Research Studies was also continued for this year. Projects under this RFA must address one of 14 research hypotheses designed to investigate the successful effects of OMM on specific diseases.
- 18 grant applications were received and reviewed by external reviewers and the BORPH. After approval by the AOA BOT, six applications have been funded for FY 2022.
- BORPH is exploring options to provide greater funding to support research grants for osteopathic medicine. Staff in Research and Public Health and Strategic Partnerships and Health Initiatives have identified a group of federal and foundation funders which support research and public health activities. Input from the BORPH will focus staff activities and grant submissions in the coming year.
- To focus research on SDOH and health disparities, the submission criteria for research abstracts were revised to add Public Health research on these topics. After approval by BORPH and the AOA BOT, the Revised Call for Research Abstracts was posted in May 2022. Abstracts are due July 11.

Policy Review

- BORPH reviewed and made recommendations to 32 sunset policies for the 2022 House of Delegates (HOD) meeting, including 3 white papers. The Bureau submitted revisions to the following sunset policy white papers:
 - End of Life Care,
 - Recreational Marijuana Use by Physicians, Students, and Patients, and
 - Harm Reduction Modalities for People Who Inject Drugs.
- The 2021 HOD requested that BORPH combine all the AOA policies on opioid and substance use into a comprehensive white paper. The white paper (H431-A2022) divides nine current AOA policies into categories on Education on Substance Use Disorders, Education on Opioid Use and Abuse, Access to Treatment, and Diversion.