



103rd Annual Meeting of the Board of Trustees and House of Delegates Annual Meeting
Chicago Marriott Downtown Magnificent Mile Hotel, 540 N. Michigan Avenue, Chicago, IL 60611

2023 Itinerary*

All times listed below are Central Time.

**Subject to Change*

Unless otherwise noted – Business Attire is required.

Wednesday, July 19, 2023		
Time	Event	Location
8 – 9 am	Board of Trustees Breakfast (Spouses / Significant Others/Guests Invited)	Marriott, Chicago E, 5 th Flr
9 am – 12 pm	Board of Trustees General Session Meeting	Marriott, Chicago A-D, 5 th Flr Click here for the Zoom Link
12 – 1 pm	Board of Trustees Lunch (Spouses / Significant Others/Guests Invited)	Marriott, Chicago E, 5 th Flr
1 – 4 pm	Board of Trustees General Session Meeting	Marriott, Chicago A-D, 5 th Flr Zoom

Thursday, July 20, 2023		
Time	Event	Location
	Individual Delegations Meetings	Marriott, Various
11:30 am – 12:30 pm	Committee on Rules and Order of Business Meeting (Members)	Marriott, Scottsdale, 5 th Flr
4 – 6 pm	Council on State Health Affairs Meeting (Open)	Marriott, Northwestern, 6 th Flr
2 – 6 pm	HOD Credentialing Open	Marriott, 7 th Flr

Friday, July 21, 2023		
Time	Event	Location
8 – 8:30 am	HOD Delegate Orientation	Marriott, Chicago E, 5 th Flr
9 am – 12 pm	House of Delegates (HOD) Meeting	Marriott, Grand Ballroom, 7 th Flr View online by clicking here
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
5:00 – 5:30 pm	OPAC VIP Reception	Marriott, Chicago D, 5 th Flr
5:30 – 6:30 pm	OPAC Reception	Marriott, Chicago D, 5 th Flr



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Saturday, July 22, 2023		
Time	Event	Location
7:30 – 8 am	House of Delegates Meeting (Nominations)	Marriott, Grand Ballroom, 7 th Flr View online by clicking here
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	2023 AOA Awards Presentation OPAC Scholarship 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 2023 / 2024 AOA President	Marriott, Grand Ballroom, 7 th Flr
6:30 – 9:30 pm	Presidential Reception	Marriott, Chicago, 5 th Flr

Sunday, July 23, 2023		
Time	Event	Location
7:30 – 11 am*	House of Delegates Meeting (Elections / Reports)	Marriott, Grand Ballroom, 7 th Flr View online by clicking here

*close of business



Marriott
CHICAGO DOWNTOWN
MAGNIFICENT MILE

The diagram illustrates the layout of a multi-story building across six floors, with specific rooms and areas highlighted for various functions:

- 2nd Floor:** Includes KITCHEN, RESTAURANT, HOSTESS, WOMEN, MEN, FEDEX/KNOX'S BUSINESS CENTER, OLDTOWN, PRINTERS ROW, REVER NORTH, WIRGLEVILLE, CLUB LOUNGE, and LAKEVIEW.
- 3rd Floor:** Includes Stairs, PHONES, WOMEN, MEN, DUPAGE, COOK, MCHENRY, GUEST, ELEVATORS, and another set of Stairs.
- 4th Floor:** Includes Stairs, SHEFFIELD, GRACE, ADDISON, MARSHALL BALLROOM, CLARK, STATE, ARMITAGE, BELMONT, AVENUE BALLROOM, WOMEN, MEN, HALSTED, and GUEST ELEVATORS.
- 5th Floor:** Includes EXPRESS ELEVATORS, PUBLIC STAIRS, WOMEN, OFFICE/CONFERENCE/REGISTRATION SECTION, MEN, GUEST ELEVATORS, CHICAGO BALLROOM (divided into sections A-H), ESCALATORS, LOS ANGELES, MIAMI, BOOTHBALE, and GUEST ELEVATORS.
- 6th Floor:** Includes EXPRESS ELEVATOR, GREAT AMERICA, LINCOLN HIND, PUBLIC STAIRS, GUEST ELEVATORS, INDIANA, IOWA, MICHIGAN, NE STATE, OPEN TO FLOOR BELOW, WESTERN, OHIO STATE, PURDUE, and NE.
- 7th Floor:** Includes EXPRESS ELEVATOR, PUBLIC STAIRS, WOMEN, OFFICE/CONFERENCE/REGISTRATION SECTION, MEN, GUEST ELEVATORS, SALON I, SALON II, SALON III, and GUEST ELEVATORS.

Key areas and callouts include:

- Elevators from Lobby and Guest Rooms** (Red box pointing to elevators on the 2nd floor).
- FR: Cmt on Resolutions** (Red box pointing to a room on the 3rd floor).
- New Mothers Room** (Red box pointing to a room on the 10th floor).
- OMT Room** (Red box pointing to a room on the 10th floor).
- TH - SA: AAO OES Area** (Green box pointing to a room on the 10th floor).
- FR: Joint Board/ House Budget Review** (Red box pointing to a room on the 4th floor).
- FR: Cmt on Pub. Affairs** (Green box pointing to a room on the 4th floor).
- FR: Cmt on Prof. Affairs** (Green box pointing to a room on the 4th floor).
- SA -Presidents Reception (Full Ballroom)** (Purple box pointing to the Chicago Ballroom on the 5th floor).
- WE: Board of Trustees Meeting** (Red box pointing to a room on the 5th floor).
- Escalators between 5th and 7th Floor** (Red box pointing to the escalator area on the 5th floor).
- TH: Cmt on Rules/Order** (Red box pointing to a room on the 7th floor).
- FR: Ad Hoc Cmte** (Red box pointing to a room on the 6th floor).
- Registration/Credentialing** (Red box pointing to a room on the 6th floor).
- FR: Cmte on Const & Bylaws** (Red box pointing to a room on the 6th floor).
- SA: Resolutions Cmte** (Red box pointing to a room on the 6th floor).
- House of Delegates** (Red box pointing to a room on the 7th floor).



2023 ANNUAL BUSINESS MEETING OF THE AOA BOARD OF TRUSTEES

General Session

Wednesday, July 19, 2023 · 9 am – 4 pm CT

Chicago Marriott Downtown Magnificent Mile Hotel · Room: Chicago A-D, 5th FL

Zoom: <https://us06web.zoom.us/j/87651395884> | Phone: 13092053325,,87651395884#

Time	Agenda Item	Presenter(s)
9 am	Call to Order and Welcome	Ernest R. Gelb, DO, FACOFP, President
	Roll Call and Quorum Establishment	Val Carr, Chief of Staff
	Osteopathic Pledge of Commitment / AOA Mission and Vision Statement	Ernest R. Gelb, DO, FACOFP, President
	Invocation	Kevin V. de Regnier, DO
9:15 am	Conflict of Interest Disclosures	Ernest R. Gelb, DO, FACOFP, President
	Adoption of Agenda	Action
	<u>Leadership Reports</u>	
9:20 am	President Report	Ernest R. Gelb, DO, FACOFP, President
9:35 am	President-Elect Report	Ira P. Monka, DO, FACOFP, President-Elect
9:45 am	CEO Report	Kathleen S. Creason, MBA, CEO
10 am	Bureaus, Committees and Councils Goals Report	Ernest R. Gelb, DO, FACOFP, President
	<u>AOA Operational Updates</u>	
10:10 am	Affiliate Relations	Nicole Blankenship, MBA, CAE, SVP, Affiliate Relations
10:20 am	Break	
10:35 am	Graduate Medical Education <ul style="list-style-type: none">GME Annual ReportMatch Update	Maura Biszewski, SVP, Certifying Board Services and GME
10:55 am	Association Management System: Fonteva Update <ul style="list-style-type: none">OverviewBenefitsLearning Management System Update	Pranav Parekh, MBA, VP, Information Technology Jay Cariño, MBA, CAE, VP, Membership Services Jeff Fraler, MS, AVP, Physician Education and CME
11:15 am	Membership Services	Jay Cariño, MBA, CAE, VP, Membership Services



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Time	Agenda Item	Presenter(s)
11:35 am	Public Policy <ul style="list-style-type: none">2024 Federal Priorities2024 State Priorities	George Thomas, DO, Chair, Bureau on Federal and Health Programs (BFHP) John-Michael Villarama, VP, Public Policy Geraldine T. O'Shea, Vice Chair, Council on State Health Affairs (CSHA) Raine Richards, VP, State Govt. and International Affairs
11:40 am	OMED 2023 Overview	Peter B. Ajluni, DO, Chair, Council of OMED Nicole Blankenship, MBA, CAE, SVP, Affiliate Relations Dawn Amaskane, CMP, DES, CAE, AVP, Administrative Affairs
11:55 am	103 rd House of Delegates Overview	Ray L. Morrison, DO, Speaker, House of Delegates
12 pm	Lunch	
	<u>Osteopathic Stakeholder Organizational Reports</u>	
1 pm	American Association of Colleges of Osteopathic Medicine (AACOM)	Robert A. Cain, DO, President and CEO
	National Board of Osteopathic Medical Examiners (NBOME)	John R. Gimpel, DO, President and CEO
	Association of Osteopathic State Executives (AOSED)	Diana Ewert, MPA, CAE, President
	American Association of Osteopathic Examiners (AAOE)	Alexios Carayannopoulos, DO
	American Osteopathic Foundation (AOF)	Dawn R. Tartaglione, DO, FACOS, DFACOS, President
	American Osteopathic Information Association (AOIA)	Norman E. Vinn, MBA, DO, Chair
	Osteopathic International Alliance (OIA)	Boyd R. Buser, DO, Chair
	Society of Osteopathic Specialty Executives (SOSE)	Carol Houston, President



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Time	Agenda Item	Presenter(s)
2 pm	Break	
	<u>Osteopathic Student Organizational Reports</u>	
	Student Osteopathic Medical Association (SOMA)	Rebecca Wolff, OMS IV, President
	Student National Medical Association (SNMA)	Erin Igwacho, OMS III, AOA Liaison
	<u>Bureau Reports</u>	
	Bureau of Emerging Leaders (BEL)	Selena G.M. Raines, DO, MPH, Chair
	Bureau of Osteopathic Specialists (BOS)	Carolyn W. Quist, DO, Chair
3:10 pm	Break	
3:20 pm	Recognition of Outgoing Advisors and Members of the AOA Board of Trustees	Ernest R. Gelb, DO, FACOFP, President
	<ul style="list-style-type: none">Thomas L. Ely, DO, FACOFPBrian M. Fiani, DO <i>Postdoctoral Trainee Member</i>Maria D. Jones, DO <i>Postdoctoral Trainee Advisory</i>Selena G. Raines, DO <i>New Physician in Practice Member</i>Tim Beals, DO <i>New Physician in Practice Advisor</i>M. Anjali James, DO <i>Student Member</i>Brianne Howerton, DO <i>Student Advisor</i>	
3:55 pm	Closing Remarks	Ernest R. Gelb, DO, FACOFP, President
4 pm	Adjournment	Ernest R. Gelb, DO, FACOFP, President



AMERICAN
OSTEOPATHIC ASSOCIATION

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Chicago, IL 60611
312.202.8000

osteopathic.org

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Organizational Written Reports

[Advocates for the American Osteopathic Association \(AAOA\)](#)

[American Osteopathic Foundation \(AOF\)](#)

[Council of Osteopathic Student Government Presidents \(COSGP\)](#)

[Bureau of Osteopathic Specialists \(BOS\)](#)



A M E R I C A N
O S T E O P A T H I C
A S S O C I A T I O N

FY2023 Bureaus, Committees and Councils Goals Report

June 2023



FY2023 Bureaus, Committees and Councils Goal Report

Goals Inventory

Goal	Status
Board of Trustees (Non-Departmental Governance)	
Committee on Administrative Personnel	
Monitor AOA human resource-related professional liability claims.	✓
Monitor and evaluate the CEO performance.	✓
Ensure all volunteer leaders have completed the necessary human resources training, as required by the state of Illinois.	✓
Perform compensation market analyses every three years for the President, President-elect and Immediate Past-President.	✓
Monitor the status and function of the employee 401K defined contribution plan.	✓
Committee on Awards	
Make the final award selections for presentation for approval by the BOT.	✓
Make final recommendations to the BOT on proposed new awards or changes to existing awards.	✓
Recommend the annual A.T. Still Lecturer for approval by the President.	✓
Committee on AOA Governance and Organizational Structure	
Provide governance oversight with respect to the AOA's governance structure.	✓
Provide governance oversight with respect the AOA's governance policies.	✓
Provide governance oversight to the CAGOS Subcommittee on Constitution and Bylaws.	✓
Provide governance oversight to the CAGOS Subcommittee on Basic Documents.	✓
Provide an annual review and update of the AOA's Administrative Guide.	✓
Review the terms and reappointment limits of the B/C/Cs.	✓
CAGOS Subcommittee on Constitution and Bylaws	
Review all Constitution and Bylaws resolutions submitted for consideration by the HOD and evaluate such resolutions for internal conflict that would be created should the resolution be approved as submitted.	✓
Suggest Constitution and Bylaws changes, which may be beneficial to the organization.	✓
Develop a timeline for the submission of the remaining suggested Constitution and Bylaws resolutions to the HOD.	✓
CAGOS Subcommittee on Basic Documents	
Review and confirm conformity of divisional society and specialty college bylaws with AOA requirements.	✓
Review and recommendations for improvement of the divisional society and specialty college bylaws submission and review process.	✓
Review and provide guidance to divisional societies and specialty colleges seeking assistance.	✓
Ethics Review and Board Appeals Committee	
Review the appeals and ethics review application processes to ensure its effectiveness.	✓
Review the scope of the AOA ethics process (the inclusion of public submissions) and make any necessary recommendations to the BOT.	✓
Review the instructions provided to appellants (i.e., scope and process of appeal) and those filing an ethics complaint, confirming their accuracy and appropriateness of tone.	✓
Verify that the revised mechanism to appropriately secure sensitive documents is functioning as intended.	✓
Ethics Review Subcommittee	
Conduct ethics reviews as directed by the President and in accordance with all policies and procedures.	✓
Review the scope of the AOA ethics process (the inclusion of public submissions) and make any necessary recommendations to the committee.	✗
Board Appeals Subcommittee	
Conduct appeals as directed by the President and in accordance with all policies and procedures.	✓



FY2023 Bureaus, Committees and Councils Goal Report

Goals Inventory

HOD Committee on Credentials	
Validate credentials of all delegates and alternate delegates of the AOA House of Delegates.	✓
Provide interim updates and reports to the AOA HOD Speaker and Vice Speaker, regarding the number of credentialed delegates.	✓
Assist the AOA HOD Speaker and Vice Speaker with establishing a quorum.	✓
Assist the AOA HOD Speaker, Vice Speaker and Secretary with voting and election procedures as needed.	✓
Public Relations Committee	
Provide governance input for the general public relations messaging approach and content.	✓
Provide governance input to media relations strategies.	✓
Provide input to the AOA social media SWAT team via the President regarding any public relations event requiring SWAT activation.	✓
Perform annual sunset review of the AOA website content.	×
Bureau of Osteopathic Specialists	
Provide governance oversight to the various certifying boards.	✓
Ensures the consistent application of BOS policy and procedures among the various certifying boards.	✓
Conducts the appeals processes with respect to AOA board certification.	✓
Review the function and necessity of the various BOS subcommittees.	✓
Monitor the effectiveness of the certifying board services significant contributor reward program.	✓
Provide resources and information regarding the ABMS certification process to remain competitive	✓
Department of Affiliate Relations	
Foster a collegial environment for affiliate leaders to provide input on critical issues being considered by the AOA BOT.	✓
Receive and consider affiliate leader input and communicate such information to the President and BOT.	✓
Participate in the development of an AOA affiliate leader educational program.	✓
Evaluate and make recommendations for all Affiliate-related award nominees to the Committee on Awards.	✓
Department of Finance	
Audit Committee	
Provide governance oversight to the selection of the audit firm and scope of audit engagement.	✓
Participate in the audit process by conducting discussions with the selected audit firm, but in the absence of management present.	✓
Present a report to the AOA Finance Committee and BOT, upon completion of the annual financial audit.	✓
Finance Committee	
Discuss and approve the annual operating budget as prepared by staff.	✓
Discuss and approve the annual capital expenditures budget as prepared by staff.	✓
Approve substantive, non-budgeted financial expenditures, not otherwise permitted by AOA policy.	✓
Review and approve a year-end report of financial statement of condition for the annual HOD meeting.	✓
Review and approved a report outlining the current year's approved operating and capital expenditures budgets for the annual HOD meeting.	✓
Periodic review of dues and non-dues revenue.	✓



FY2023 Bureaus, Committees and Councils Goal Report

Goals Inventory

Goal	Status
Joint Board/House Budget Review Committee	
Review and accept the annual operating budget report.	✓
Review and accept the annual capital expenditures budget report.	✓
Report to the HOD and recommend concurrence of the expenditures noted in the year-end statement of financial condition.	✓
Review and accept the report of the strategic planning committee (when applicable).	n/a
Department of Education	
Provide governance oversight on issues impacting undergraduate medical education, while preserving the necessary autonomy of COCA, as outlined by the U.S. Department of Education.	✓
Provide governance oversight on issues related to graduate medical education.	✓
Provide governance oversight on issues related to continuing medical education.	✓
Provide governance oversight to the Council of OMED.	✓
Provide governance oversight to the PTRC.	✓
Council of OMED	
Provide governance oversight with respect to the annual OMED conference.	✓
Participate in presenting a report to the BOT following OMED.	✓
Participate with AOA leadership in the decision to have a Keynote Speaker(s) and in the selection of Keynote Speaker(s).	✓
Program and Trainee Review Council	
Provide governance oversight to the “teach out” process under the AOA-AACOM-ACGME MOU.	✓
Ensure the well-being of trainees within the teach out process.	✓
Work collaboratively with the osteopathic specialty colleges to ensure that the appropriate standards are maintained for the training programs in the “teach out” process.	✓
Work collaboratively with the osteopathic specialty colleges to ensure the necessary educational resources are available to the trainees to fulfill the AOA’s commitments under the “teach out” process.	✓
Department of Governmental Affairs	
Bureau on Federal Health Programs	
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.	✓
Increase affiliate visibility to BFHP meetings and the opportunity to participate in bureau meetings.	✓



FY2023 Bureaus, Committees and Councils Goal Report

Goals Inventory

Goal	Status
Department of Governmental Affairs (Continued)	
Council on Economic and Regulatory Affairs (CERA)	
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 and payer behaviors adversely impacting our members.	✓
Recommend strategies to address payer behaviors or policies adversely impacting our members.	✓
Council on State Health Affairs (CSHA)	
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.	✓
Department of Membership	
Bureau of Emerging Leaders	
Provide governance oversight with respect to the interests of osteopathic medical students.	✓
Provide governance oversight with respect to the interests of osteopathic physicians in postdoctoral training.	✓
Provide governance oversight with respect to the interests of physicians no more than five years past completion of postdoctoral training.	✓
Provide a quarterly report to the BOT, regarding the current issues facing all three BEL categories.	✓
Publish a monthly or quarterly publication to all BEL constituents.	✓
Review the BEL scholarship program for impact and future viability.	✓
Bureau of International Osteopathic Medicine	
Provide governance oversight with respect to expansion of the osteopathic profession internationally.	✓
Advise the AOA BOT on issues associated with the osteopathic profession internationally.	✓
Work collaboratively with the Osteopathic International Alliance to support their mission.	✓
Bureau of Membership	
Provide governance oversight with respect to membership services.	✓
Provide governance oversight with respect to dues structure and fees.	✓
Provide governance oversight with respect to the annual membership renewal processes.	✓
Recommend specific membership initiatives for aggressive membership growth.	✓
Collaborate with the COMs on promotion of osteopathic medical student membership.	✓
Department of Research and Public Health	
A.T. Still Foundation and Research Institute	
Ensure the financial stability of the foundation.	✓
Ensure the mission of the foundation is fulfilled annually.	✓
Evaluate the use the foundation's grants, ensuring meaningful outcomes are achieved.	✓



FY2023 Bureaus, Committees and Councils Goal Report

Goals Inventory

Goal	Status
Department of Research and Public Health (Continued)	
Bureau of Osteopathic Research and Public Health	
Make recommendations to the AOA BOT for the annual public health initiatives of the AOA.	✓
Create unique resources defining and our addressing healthcare disparities.	✓
Continue the problem/question-focused research grant program.	✓
Investigate additional funding sources for osteopathic research.	✓
Provide governance guidance, regarding public health-related grants projects.	✓



2024 FEDERAL PRIORITIES

SUPPORTING PHYSICIANS AND THEIR ABILITY TO CARE FOR PATIENTS

- Support enactment of legislation and regulatory reforms that promote physician wellness and safety in workplaces.
- Support enactment of legislation that strengthens the financial stability of independent physician practices.
- Support enactment of legislation and regulatory reforms that promote osteopathic manipulative treatment (OMT).

STRENGTHENING THE PHYSICIAN WORKFORCE WHERE IT IS NEEDED MOST

- Support enactment of legislation that increases the physician workforce; and provides an equitable distribution of graduate medical education resources to practice types and communities where it is needed most.
- Support enactment of legislation that reforms student loan repayment programs.
- Educate Congress on the importance of physician-led care in all communities, and how programs that improve physician shortages in underserved rural and urban communities are better for patients, and more effective and efficient than scope of practice expansion.

ACCESS AND AFFORDABILITY

- Support enactment of legislation that alleviates arbitrary burdens in step therapy and prior authorization to improve patients' access to prescription drugs and physician services.
- Support legislative and regulatory reforms that ensure continued and improved coverage and payment for telehealth services.
- Support enactment of legislation and regulatory reform that expands access to medical services and prescription drugs that treat and manage chronic conditions.

REGULATORY REFORM

- Support policies that address systemic issues and improve payment adequacy for medical services, reduce administrative burdens, eliminate barriers to coverage and care, and strengthen the patient-physician relationship.
- Support value-based arrangements that provide adequate payment and greater flexibility in service delivery.
- Support health information technology (HIT) policies that reduce physician burden through greater interoperability and make care delivery more efficient and seamless across the healthcare spectrum.

PUBLIC HEALTH

- Promote policies that reduce health disparities across ethnic, racial, geographic, socioeconomic, and other underserved populations.
- Support policies that increase utilization of evidence-based vaccine guidelines, address vaccine hesitancy, expand patient and physician education, and ensure adequate payment for vaccine administration.

FEDERAL FUNDING

- Support funding that enhances research opportunities for osteopathic physician-researchers and osteopathic institutions.
- Support funding that advances an infrastructure that promotes the provision of primary care to advance health and wellness for patients.
- Support funding for the Centers for Disease Control and Prevention and National Institutes of Health for research on reducing firearm violence.



2024 STATE PRIORITIES

SCOPE OF PRACTICE & NEW LICENSURE TYPES

Support the physician-led, team-based model of care and uniform, evidence-based licensure pathways for all clinicians based upon scope of practice.

OSTEOPATHIC EQUIVALENCY AND RECOGNITION

Ensure that the osteopathic profession and credentials are recognized as equivalent to their allopathic counterparts. Educate legislators about current osteopathic terminology, and the distinctive philosophy and practice of osteopathic medicine. Support DO licensure and regulation by osteopathic medical boards in dual board states.

TRUTH IN ADVERTISING

Support legislation that requires all health care providers to affirmatively communicate their degrees and licensure types to patients, restricts -ologist titles to physicians, and requires entities offering physician board certification to possess legitimate training and testing requirements.

PUBLIC HEALTH

Work to increase public awareness and implement evidence-based recommendations and best practices related to public health issues. Support funding to strengthen our public health care infrastructure and workforce, address health care disparities and social determinants of health, and establish a robust national strategy to combat future public health emergencies.

PHYSICIAN WORKFORCE

Support legislation that expands the physician workforce by increasing funding for graduate medical education, especially in high-need specialties and locations, and expanding financial incentives to facilitate care for the underserved.

TELEMEDICINE

Support the delivery of appropriate health care services, including the prescription of controlled substances, through telemedicine and other communications-based technologies. Advocate for coverage and payment parity between these services and similar services delivered in-person.

PRESCRIPTION DRUG MISUSE, ABUSE AND DIVERSION

Support evidence-based approaches that balance the need to curb prescription drug misuse with ensuring access to appropriate, timely health care. Support legislation that promotes non-pharmacological pain management modalities, such as osteopathic manipulative treatment.



ACCESS AND AFFORDABILITY

Support access to timely, affordable, high-quality care for all patients. This includes:

- Supporting network adequacy and transparency standards for insurers.
- Supporting stabilization of state health insurance exchanges and expanding Medicaid.
- Supporting access to affordable prescription drugs, including by regulating Pharmacy Benefit Managers.
- Supporting the removal of arbitrary burdens in step therapy and prior authorization.
- Supporting physician self-regulation by protecting the authority and autonomy of state medical boards, and opposing legislation that interferes with professional self-regulation, the physician-patient relationship, or physicians' ability to provide evidence-based information and care to their patients.

INTERSTATE MEDICAL LICENSURE COMPACT

Support enactment of the Compact, which enhances physician license portability and increases patient access to care.

Organizational Written Reports





In my role as President of the Advocates of the American Osteopathic Association this year I am working with our incredible board to implement our theme of “Advocating with Action”. We are focusing on the importance of advocating for the osteopathic profession through each step of the journey from student to resident to physician. The theme supports our continued growth while still reflecting on our 83 year history as a national organization.

We have several steps to advocate with action this year. We have made a commitment to our strategic plan to provide resources and programs remotely and in person for our membership and beyond. We continue to partner with the AOF and the AOA Physician Wellness task force. We have updated our website, increased our social media presence, and we continue to support AAOA Special Projects and SOMA with sponsorships from our annual fun run at OMED.

Over the past few years we have continued to strengthen our relationship with the AOF. We have partnered on both the Donna Jones Mortisugo Award and the Holiday Hug Award. The Donna Jones Mortisugo award recognizes the spouses of graduating osteopathic medical students who have supported and have been involved in their loved one’s journey throughout medical school. The Holiday Hug Award gives two medical school or residency families the chance to have a better holiday by providing extra funds during the holiday season. Last year we received over 20 applications and awarded the Holiday Hug to two deserving families. We are thankful to partner with the AOF and have a more involved role in this award. As an organization we remain committed to finding ways to increase funding to our partners and expanding our reach of impact.

A highlight of our advocate work has been regarding mental health. We have been involved with the Yellow Robin program for the last 16 years. Over the past year we have expanded our focus to help support the mental health of our osteopathic physicians and their families. Our mental health committee has selected 3 mental health organizations we would like to partner with. They are NAMI (National Alliance on Mental Health), Medical Minds Matter, and Anxiety & Depression Association of America. Last June members of our Mental Health Committee attended the virtual NAMI conference and came away with a lot of information that we are actively working on implementing. We have developed partnership letters for these organizations and with the help of the AOA we are excited to see how we can continue to focus on the mental health of Osteopathic physicians and students.

We continue to focus on strengthening our relationship with state affiliates along with our SAA (Student Advocate Association) and IRAA (Intern & Resident Advocate Association) presidents. Last year we held quarterly meetings for the National Council of State Advocate Leaders and for the National Council of Student and Resident Advocate Leaders. We network and find opportunities to work together and support one another, especially after the pandemic created a challenging few years for all of our membership groups. We are looking forward to continuing these meetings and growing our advocate family.

The AAOA continues to invest into the development of our SAA and IRAA groups. Our SAA and IRAA liaisons have been great at fostering relationships with the boards of these organizations and offering the support and encouragement needed. We have added a couple of new SAA groups and are talking to other COMs about the importance of having a SAA on their



campus. We have had a greater presence on social media, sent out surveys and held virtual gatherings throughout the year and felt like we were able to connect to these members better. We have been able to help address common struggles like finances, “medical marriage”, burnout and having a family during training. We understand the importance of not feeling alone during medical school and residency, and have connections to be able to offer support, encouragement and advice. Our SAA and IRAA committee has been working on identifying more resident groups and residents that are wanting to be involved in advocacy. We had our first virtual IRAA meeting where residents joined from various locations across the country. We are hoping to continue these and pull in those who are in the gap period between SAA membership and when they join state organizations. Our SAA/IRAA event continues to be well attended during OMED and would not be possible without the support and partnership with the AACOFPP (Auxiliary to the American College of Osteopathic Family Physicians).

Each year during OMED the AAOA hosts a number of events that physicians, students and their families are able to attend. This past OMED we did a family fun event where we took 45 people on a tour of Fenway Park. We also host our annual A.T. Still Fit for Life Fun Run, which took place in the Boston Commons.. With your help and sponsorships we were able to raise \$19,500 that will go directly to SOMA scholarships and our Special Projects fund. With the generosity of our partners we were able to increase our Special Project funding last year from \$9000 to \$14,500. We were also able to give \$2500 towards SOMA Scholarships and \$1000 towards our Holiday Hug award.

Our board is composed of many young board members, several of whom are student and resident spouses. We also have 3 board members that are not spouses, but are family members, friends and colleagues of Osteopathic Physicians. The diversity speaks volumes to the commitment and passion that our board has for the AAOA and for osteopathic advocacy in general. It is exciting to watch the board grow and develop further. We, of course, could not do this without the support of our AOA liaison, Dr Kowalski and all of you. Thank you for always supporting what we DO.

The AAOA has continued to grow and evolve over the past several years. We are grounded in our roots and continue our mission: supporting and promoting the Osteopathic profession while creating a strong, close network of people who are passionate about advocating for it “with action”. We thank the AOA for their continued partnership and for the opportunities we have to collaborate. We are looking forward to continuing to grow and support our osteopathic family.

Respectfully submitted,

Lori Hildebrand

President Advocates for the American Osteopathic Association 2022-2023

American Osteopathic Foundation Report to the Board of the American Osteopathic Association

Submitted by Dawn Tartaglione, DO, FACOS, DFACOS
American Osteopathic Foundation Board President

July 2023

Colleagues:

The American Osteopathic Foundation (AOF) would like to acknowledge its valued relationship with the American Osteopathic Association (AOA) and commend our shared commitment to the continued excellence of Osteopathic medicine as well as the professional expertise that is fundamental to our profession.

As AOF's Board President, I am pleased to provide this report to the Board of the American Osteopathic Association.

Overview

For nearly 75 years, the American Osteopathic Foundation has supported and enhanced through funding, the work of the Osteopathic profession. We began in 1949 as The Osteopathic Foundation, providing and managing loans for medical students. During the 60's we grew into the largest national Osteopathic public foundation providing grants throughout the profession; and this decade, we transformed once again into one of our profession's preeminent strategic philanthropic partners for charitable individuals, organizations, foundations, and associations.

Throughout our history, our mission has remained focused and strong: to support programs and services that promote Osteopathic medicine and enhance patient centered care. To advance our mission, strategic expansion initiatives have been periodically implemented, including:

- National recognition awards – Educator of the Year, Physician of the Year, and Lifetime Achievement – were developed in the early 2000s to shine a spotlight – across the country and across specialties – on annual Osteopathic champions.
- The William G. Anderson, DO Minority Scholarship Fund grew substantially; from one annual award in 2002 to seven scholarships in 2022.
- As part of the LGBTQ+ Health Equity and Inclusion initiative, the inaugural Jeffrey S. Grove, DO, Pride Scholarship was awarded last October.

Board of Directors and Professional Staff

Our governing body is comprised of astute professionals from various disciplines across the country, including Osteopathic physicians, corporate executives, civic leaders, academic educators, and medical students who believe in and support the Osteopathic profession.

As we continue to evolve in alignment with the growth of our profession, we are grateful for the shared resources throughout the years, from volunteer leadership who have also served on the AOA Board, Committees, Councils or Bureaus, including: Julianne Sees, DO, Jeffrey Grove, DO, Martin Levine, DO, Sonia Rivera-Martinez, DO; Peter Ajluni, DO, Larry Wickless, DO, and Anthony Ottaviani, DO – to name a few. While we cannot list everyone, all current and former volunteers are warmly appreciated. They have each made the Foundation what it is today.

Our Board is supported daily by a dynamic staff team spearheaded by AOF's CEO, Rita Forden. This incredible team works tirelessly to execute strategic priorities, maximize fund distributions; partner with COMS, Specialties and Associations to increase impact; and communicate real-time opportunities to our various constituencies.

Financials

The AOF's Board of Directors has the fiduciary responsibility for all donations (including outright contributions, pledges, endowments, or restricted funds) and ensures assets invested are consistent with established policies and procedures. In March, the Foundation completed its annual audit for our fiscal year ending December 31, 2022, which was ruled a "clean audit" by the auditors.

The audit and other financial information are available on our website at aof.org.

Fundraising and Donor Stewardship

The Foundation enjoys a loyal base of donors, all of whom are critical in realizing our mission. We are pleased and appreciative of the annual generosity of members of the Osteopathic medical profession who support our funding priorities and collaborative programs.

We look forward to thanking each and every donor as contributions are received, but this summer the Foundation is launching a special program, our *Century Legacy Society*, to formally recognize donors who have given consecutively for twenty years and longer.

Grants, Scholarships, and Programs

The Foundation attracts hundreds of grants, scholarships, and award applicants every year. Our goal is to increase the number of grant recipients, as well as the amount distributed, especially during economically depressed years when the need is so great. Toward that end, through judicious planning; sound investment planning; programmatic pivots; and Board focus/discipline, the Foundation has been able to continue this upward trajectory for the last three years.

As we celebrate our 2023 Spring Cycle recipients, I'd be remiss if I didn't thank and acknowledge the dozens of volunteer reviewers who gave hours, if not days, of their time to ensuring a robust and unbiased review process.

The scale of our giving is matched by a deep sense of responsibility in how we distribute it, making sure limited resources are stewarded and deployed as effectively as possible through our five diversified funding streams: Educational Scholarships, Research Grants, International Humanitarian Outreach, Community Service Projects, and Industry Recognition.

This Fall, as part of our five-year strategic plan, the Foundation will utilize outside contractors to conduct an objective, proactive deep dive into our impact measurements. Some of our goals for this internal review are to identify gaps in our funding strategies, sunset outdated platforms that drain resources, increase efficiencies around data capture and reporting, define future impact deliverables, expand initiatives as appropriate, and increase return on donor investment.

Strategic Initiatives and Partnerships

We believe a strong future should include dialogue and engagement with traditional and non-traditional industry expertise to help bridge boundaries and open new paths of excellence and innovation.

Project Future Forums, one of our more audacious undertakings, was initiated in 2021 during COVID, launched directly following in 2022, and will continue through 2023, brings Strategic Thinkers, Thought Leaders and Subject Matter Experts together for deep dive discussions around advancement opportunities, including, Professional Identity, Clinical Practice, the Educational Continuum, etc. White Papers will be created and shared following each forum.

As the Foundation reflects on our past, we thank you. As we plan for our future, we look to you. As Leaders within the profession, you are in a unique position to share your insights

and perspectives, and well as your thoughts and vision. We welcome your input so that we may strengthen existing partnerships and create new ones that advance the tenets and philosophy of Osteopathic medicine.

On behalf of the entire Board and Staff of the American Osteopathic Foundation, I offer my sincere thanks for all you do on behalf of the Osteopathic profession. We look forward to continued collaboration with you, individually, and with our stalwart partner, the American Osteopathic Association.

Respectfully submitted,

A handwritten signature in black ink that reads "DTartaglione DO FACOS". The signature is written in a cursive, flowing style.

Dawn Tartaglione, DO, FACOS, DFACOS
President

American Osteopathic Association Annual Meeting General Session, COSGP report

Caroline Dorothy Rizea, OMS-III

COSGP National Chair

Introduction:

On behalf of the Council of Osteopathic Student Government Presidents (COSGP), I am honored to have this time and space to report on the activities and accomplishments of the COSGP. As the council's new National Chair, I am thrilled to be working alongside dedicated and knowledgeable osteopathic medical students as we take on this next year of leadership. Without the support of the AOA, we would not be able to do what we do each day. Your organization has provided us with confidence to continue to succeed in our efforts of bettering the osteopathic medical student experience.

Year in review:

We all learned during the pandemic how necessary zoom was for communicating when we could not physically travel to one another. The virtual COSGP meetings were extremely successful during those difficult years, so we have decided to adopt this virtual culture on a more permanent scale for two of our quarterly business meetings. The current general council is made up of incoming second year medical students, most of whom attended our in-person meeting in April, in correlation with AACOM Educating Leaders. The COSGP Summer Business Meeting took place virtually on July 8th and 9th. Our executive board worked hard to ensure that this virtual meeting was as engaging as our in-person meetings. Our COSGP National First Vice Chair, Molly Frey, worked on an agenda providing wellness, diversity, leadership, and networking opportunities for all students in attendance at our conference. We are grateful for the growth of zoom over these last few years, as it provides the ability to engage students from multiple different time zones and across all osteopathic medical schools.

In April of this year, COSGP hosted its first annual National DO Day of Service during National Osteopathic Medicine week. Hundreds of students participated in local service projects, some of which included volunteering at soup kitchens, animal shelters, nursing homes, cleaning parks or beaches, and engaging with children in the community. The outgoing COSGP National Programs Representative, Samantha Lynch, led a group of general council members in organizing this nation wide event, and we are proud of her efforts in making this first ever event of its kind, not only possible, but also a success.

The Justice, Equity, Diversity, and Inclusion program (JEDI) began as a pilot program through Burrell College of Osteopathic Medicine this year. Diversity, equity, and inclusion are often discussed in the classroom throughout our first two years of medical school, but the JEDI program was created to engage osteopathic medical students outside of the classroom, and instead, venture out into their greater communities. This program will place osteopathic medical students in environments where they will experience diversity and learn to be vigilant in recognizing discrimination and prejudice. Aberto Velasco and Kevin Weiss from Burrell College of Osteopathic Medicine have been guiding this pilot program at their COM over the last few months, and COSGP is excited to help implement this on a national level. Similar to the Translating Osteopathic Understanding into Community Health program (TOUCH), students will be able to log hours for events that encompass the requirements for a JEDI related event.

Looking forward:

Student delegates are excited to attend the AOA House of Delegates. The COSGP has worked with these students to educate them on the expectations of this House of Delegates. We held our summer quarterly business meeting prior to the House of Delegates, to ensure students had time to ask questions and bring forward concerns. At my first House of Delegates last July, I remember it taking me a while to understand how everything was run, and what my role was as a student delegate. Creating this open forum of discussion prior to this annual event has prepared students to be more engaged and educated prior to attending the House of Delegates. COSGP is excited to work alongside the Student Osteopathic Medical Association (SOMA) at our annual National Osteopathic Student Caucus (NOSC) before the House of Delegates begins. Here, we get to sit as one united organization of student leaders to speak about resolutions being brought forward at the House the following day.

Each year, the COSGP executive board brainstorms a theme that embodies the vision for the year. This year's theme is Growth. With this theme in mind, our goal for this year is to better prepare osteopathic medical students on their leadership journey outside of their preclinical years. We are bringing in past COSGP executive board members to discuss residency and life outside of the classroom with general council members. We are working to increase the involvement and relationship of osteopathic medical students with the Committee on Student Affairs to better the communication during the preclinical years, therefore, better preparing students for their clinical experiences during their third and fourth years of school. We are excited for the year ahead, and to create a brighter future for osteopathic medical students that will come after us. We thank you for your constant support as we navigate our own leadership journeys while also growing as future osteopathic physicians. We are grateful for the relationship we have with you, the American Osteopathic Association, and value the mentorship you have provided our organization with throughout the years. Thank you again for this opportunity to share with you the COSGP report today.

Respectfully,

A handwritten signature in black ink that reads "Caroline D Rizea". The signature is written in a cursive, flowing style.

Caroline Dorothy Rizea, OMS III
COSGP National Chair
University of New England College of Osteopathic Medicine

Report of the Bureau of Osteopathic Specialists

Carolyn Quist, DO, Chair

June 2023

This report highlights activities of the Bureau of Osteopathic Specialists (BOS) and the committees that report to the BOS from August 1, 2022 through June 30, 2023.

Bureau of Osteopathic Specialists (BOS)

The BOS convened virtually for its Annual Meeting in November 2022 where revisions and updates to the Handbook of the Bureau of Osteopathic Specialists were discussed and approved. The revisions were submitted to the AOA Board of Trustees (BOT) which received final approval in February 2023.

The BOS next convened virtually in April 2023 for its Midyear Meeting. During the Midyear Meetings the BOS approved a recommendation to the BOT for the immediate retirement of the Child and Adolescent Neurology subspecialty exam administered by the American Osteopathic Board of Neurology & Psychiatry.

At both the BOS Annual and Midyear meetings, AOA leadership presented an update on AOA activities and initiatives; the Department of Certifying Board Services reported on departmental activities; and reports were adopted as presented by BOS committees and task forces.

BOS Executive Committee

The BOS Executive Committee convenes monthly and acts on the full BOS between meetings. The Committee has met eight (8) times since August 1, 2022. Committee activities and actions taken during these meetings include:

- Diplomate requests for exceptions to policy to participate in certification examinations, including, request to participate in subspecialty exams prior to obtaining primary certification and/or without residency/fellowship training in the specialty/subspecialty.
- Specialty Certifying Board Member and Conjoint Certification Examination Committee (CCEC) Member nominations and officer elections.
- Initial review and comments related to extensive amendments to the Handbook of the BOS.
- AOBA's request to extend their alternate clinical exam format through December 31, 2025, with a recommendation that the AOBA consider permanently implementing the alternate clinical exam format.
- AOBD's request to extend the clinical pathway for Mohs Micrographic Surgery for three (3) years until December 31, 2025.
- AOBNP's request to delay implementation of the revised Child and Adolescent Psychiatry subspecialty examination process, with implementation by Jan 1, 2027.
- AOBNP's request to place four (4) diplomate certifications into "Inactive" status due to non-compliance with longitudinal assessment.
- AOBOG's request to change the name of the AOBOG Female Pelvic Medicine and Reproductive Surgery (FPMRS) subspecialty certification to Urogynecology and Reconstructive Pelvic Surgery (URPS).
- AOBOS' request to allow 4th year residents to participate in the AOBOS Part I Written Examination for primary initial AOBOS board certification.
- 2019-2021 Certification CME Cycle updates.
- Specialty certifying board revisions to their longitudinal assessment plans to be implemented beginning January 1, 2025.
- Recommendation to reaffirm as amended the sunset policy H210-A/18 titled "Osteopathic Continuous Certification – Affordability of" to the AOA House of Delegates.
- Specialty certifying board request to allow a board member to complete a full 3-year term should the board member reach the 12-year term limit in the middle of their final 3-year term.
- Conflict of Interest (COI) policy revisions for AOA specialty certifying board members and subject matter experts.
- Proposal to reinstate the annual board certification fee.

Report of the Bureau of Osteopathic Specialists

Carolyn Quist, DO, Chair

June 2023

Standards Review Committee (SRC)

The SRC convened seven (7) times since August 1, 2022. Committee activities and actions taken during these meetings include:

- AOBD's request to require AOBD diplomates submit a Quality Improvement attestation form to fulfil their OCC Component 4 requirements with implementation of the requirement on January 1, 2023.
- Specialty certifying board's request to revise their longitudinal assessment plans to align with the SRC's requirements for longitudinal assessment with implementation of the revisions on January 1, 2025
- AOBs' requests to eliminate rationales for longitudinal assessment items.
- 2022-2024 specialty certifying board proposed Certification CME Cycle Requirements.
- Technical reporting: Purpose and role and review and approval of several technical reports.
- Specialty certifying board proposed requirements for the 2022-2024 Certification CME cycle.
- Longitudinal assessment requirements for subspecialty examinations.
- Proposed revisions to the *Goals and Methods for Longitudinal Assessment* developed by the SRC.

Appeal Committee

At the 2023 BOS Midyear Meeting the Appeal Committee reported no appeal hearings were held. Several appeal requests were submitted by applicants seeking to sit for the Addiction Medicine subspecialty certification exam without meeting the eligibility requirements. The Committee subsequently met to discuss available options, if any, for these applicants to meet the eligibility requirements and subsequently reaffirmed its position that the appeal requests submitted do not meet the scope of possible appeal as specified in the *Handbook of the Bureau of Osteopathic Specialists (BOS)*.

Certification Compliance Review Committee (CCRC)

The CCRC is charged with evaluating actions taken on licensure for compliance with certification and OCC requirements and considers requests for waivers or special considerations related to Component 4 of Osteopathic Continuous Certification (OCC). At the 2023 BOS Midyear Meeting the CCRC reported that the Committee convened virtually in December 2022 and considered a request for certification reinstatement, which was tabled until additional information is received which has been requested from the diplomate.

Jurisdiction Committee

The Jurisdiction Committee considers and reviews petition requests for the establishment of new specialty certifying boards, the assignment or transfer of jurisdiction, initiation of retired status of a specialty certifying board or examination, or the reactivation of a retired specialty, subspecialty, or area of added qualification examinations (CAQ). After the initial review of the petition by the Committee a recommendation is made to the BOS on how to proceed. The Jurisdiction Committee reported at the 2023 BOS Midyear Meeting that a petition for the creation of a CAQ is currently tabled pending receipt of additional information. Additionally, the Committee provided a recommendation to the BOS regarding the immediate retirement of the Child and Adolescent Neurology subspecialty examination administered by the American Osteopathic Board of Neurology & Psychiatry.



103rd House of Delegates Annual Meeting
Friday, July 21, 2023
9 am – 12:15 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	Rebecca Wolf, OMS IV, National President, Student Osteopathic Medical Association (SOMA)
		Caroline Rizea, OMS III, Chairman, Council of Osteopathic Student Government Presidents (COSGP)
	Pledge of Allegiance	Diana Ewert, MPA, CAE, President, Association of Osteopathic State Executive Directors (AOSED)
	National Anthem	NYIT Notochords
	Presentation of Colors Concludes	Emerald Society / Chicago Police Department
	Memorial Observance	Ray L. Morrison, DO, Speaker, House of Delegates
	Invocation	Thomas L. Ely, DO, AOA Past President – 124th
	Osteopathic Pledge of Commitment	Ray L. Morrison, DO, Speaker, House of Delegates
	Credentials Committee Report	Mark E. Eastman, DO, Chair Scott S. Cyrus, DO, Vice Chair
	Colleges of Osteopathic Medicine Presentation	Ray L. Morrison, DO, Speaker, House of Delegates
	Greetings from Chicago	Kathleen S. Creason, MBA, AOA Interim CEO
	Introductory Comments	Ray L. Morrison, DO, Speaker, House of Delegates
	▪ AOA Past Presidents	
	▪ 2022/2023 AOA Board of Trustees	
	▪ Guests	
	▪ Pages	
	Advocates of the American Osteopathic Association (AAOA)	Lori Hildebrand, President
	HOD Committee on Rules and Order of Business	Jeffery Dunkelberger, DO, Chair Kenneth A. Heiles, DO, Vice Chair



103rd House of Delegates Annual Meeting
Friday, July 21, 2023
9 am – 12:15 pm CT

Approval of HOD Reference Committees and
Assignments

Ray L. Morrison, DO, Speaker, House of Delegates

2022 / 2023 AOA Presidential Address

Ernest R. Gelb, DO, FACOFP, President

Meeting Break

Reports of the American Osteopathic Association

Interim Chief Executive Officer's Report

Kathleen S. Creason, MBA, Interim CEO

AOA Financial Report

Joseph A. Giaimo, DO, MACOI, Chair, Finance Committee

2022 / 2023 Departmental Chair Reports*

Affiliate Relations

Frank M. Tursi, DO, Chair

Finance

Richard R. Thacker, DO, Chair

Education

Robert S. Dolansky, DO, Chair

Governmental Affairs

James M. Lally, DO, Chair

Membership

Julieanne P. Sees, DO, Chair

Research and Public Health

Sonia Rivera-Martinez, DO, Chair

JOM Editor in Chief Report

Ross D. Zafonte, DO, Editor in Chief

Meeting Recess

(OPAC & AOIA)

Ray L. Morrison, DO, Speaker, House of Delegates

AOA Staff Recognition

Ray L. Morrison, DO, Speaker, House of Delegates

OMED 2023 Update

Joshua D. Lenchus, DO, 2023 Program Chair

HOD Process

Ray L. Morrison, DO, Speaker, House of Delegates

Meeting Recess

(Reference Committee Chairs/Members
Orientation w/Lunch)



103rd House of Delegates Annual Meeting
Friday, July 21, 2023
9 am – 12:15 pm CT

* [Written Departmental Chair Reports](#)

1:30 -
4:30 pm

HOD Reference Committee Meetings

Committee on Educational Affairs (200 Series)
Committee on Professional Affairs (300 Series)
Committee on Public Affairs (400 Series)
Committee on Constitution & Bylaws (500 Series)
Ad Hoc Committee (600 Series)
Joint Board/House Budget Review Committee (700 Series)
Committee on Resolutions

Avenue Ballroom, 4th Floor
Clark, 4th Floor
Addison, 4th Floor
Northwestern/Ohio/Purdue, 6th Floor
Indiana/Iowa/Michigan, 6th Floor
Sheffield, 4th Floor
Kane, 3rd Floor

Written Departmental Chair Reports





Report of the Department of Affiliate Relations
Frank M. Tursi, DO, Chair
July 2023

This report highlights activities of the Department of Affiliate Relations from August 1, 2022, to July 1, 2023.

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 7, 2022, February 27, 2023, and May 22, 2023).
- BAR members were asked to share feedback and suggestions for enhancements related to OMED, the AOA's Midyear Meeting, DO Day, and the Affiliate Leader Meeting.
- Affiliate Town Halls on timely and relevant topics identified by affiliate leaders were held in addition to Quarterly Affiliate Calls with the AOA CEO.

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

- President Gelb and President-Elect Monka attended BAR meetings as their schedules allowed.
- In addition, during monthly calls with the BAR Chair, staff shared feedback from affiliate leaders pertaining to their concerns, activities, and service requests. Drs. Gelb and Monka regularly 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 Meeting was held May 2-3, 2023. The program, attended by 19 affiliate leaders representing 24 affiliate organizations, featured the following topics: Engaging Early Career Professionals, Association Ethics, Grant Writing, Contract Review, Cybersecurity, The Evolution of CME/CPD and Digital Learning Principles, and Association Meetings and Conventions – Best Practices. Affiliate leaders enjoyed Chicago-style pizza and a friendly game of "Osteopathic Family Feud". They also heard a presentation about Bob E. Jones, CAE. Additionally, all AOA departments participated in a "World Café" where affiliate leaders were able to interact with the AOA's Senior Leadership Team in every AOA department, as well as with representatives from AOF and AOIA. Affiliate leaders also participated in a networking break with all AOA staff.



Report of the Department of Affiliate Relations
Frank M. Tursi, DO, Chair
July 2023

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 2022 Outstanding Affiliate Awards were presented to the following three affiliates during OMED22: Arizona Osteopathic Medical Association (AOMA), American College of Osteopathic Pediatricians (ACOP) and the Pennsylvania Osteopathic Medical Association (POMA).
- 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 2023 Bob E. Jones, CAE Award recipient is Kris Nicholoff, CEO/Executive Director of the Michigan Osteopathic Association (MOA). Mr. Nicholoff will be recognized at the 2023 AOA House of Delegates.



Report of the Finance Department
Richard R. Thacker, DO, Chair
July 2023

This report highlights activities of the Finance Department from August 2022 to June 2023.

FY23 was the first full year of operations without COVID restrictions.

- Overall, we ended with better than expected operational results.
- For our largest category of assets, namely investments, returns were lower than in prior years and throughout the year, we experienced negative and positive swings in returns that were very much in line with Federal Reserve interest rate increases.
- Membership dues revenues were challenged by the 19 month extended membership period but offsetting this, Certifying Board Services and OMED results were strong, helping to bring overall revenues closer to budget.
- Travel and meeting expenses were lower and staff vacancies and reorganizations contributed to the lower expenses.
- The unaudited and very preliminary operating surplus for this fiscal year is positive revenues over expenses of \$400,000 versus a budget of \$8,000. We hope to get slightly better final results.
- Reserves were \$58.6 million at May 31, 2022 and projected to be \$58.7 million at May 31, 2023. This is a reserve percentage of 300% of required reserves. These reserves are directly impacted by investment results and operational results. As a reminder, the required reserve is 75% of operating expenses from two years earlier.
- In terms of Finance Dept activities:
- We approved a balanced AOA FY 2024 Operating Budget in FY2023.
- We approved the AOA FY2024 Capital Budget in FY2023.
- We approved the AOA FY2024 - 142 E Ontario Budget in FY2023.
- We approved a new audit firm – Marcum LLP for the FY2022 and the draft audits are currently being reviewed.
- We added to the transparency of financial reporting by providing new reports for the Board to review.
- We implemented Sage, a new cloud-based accounting system after 20+ years with an obsolete system. We have high hopes for the increased efficiency and timeliness of financial reporting as a result of this new system, which is currently being tested by the Finance department and will be rolled out within the next month.
- Looking ahead, FY2024 may be a challenging year for AOA as several major efforts will be underway to protect and enhance our revenue streams.
- It's expected that the Finance department to play a key role in helping the Board of Trustees and the management team review and analyze financial results to ensure prudent decision making.



Report of the Department of Educational Affairs
Robert S. Dolansky, DO, Chair
July 2023

This report highlights the activities of the AOA Bureaus, Councils and Committees that report to the Department of Education Affairs from August 2022 – June 2023.

Commission on Osteopathic College Accreditation (COCA)

- The COCA received full recognition from the World Federation for Medical Examiners (WFME), for a period of 10 years.
 - The COCA submitted its first annual report for continued recognition.
- For the 2023-2024 academic year, the COCA will accredit 40 colleges of osteopathic medicine (COMs) operating at 65 sites.
- Two new sites will begin instruction in the 2023-2024 academic year: Rocky Vista University College of Osteopathic Medicine's branch campus in Billing, Montana, and Touro College of Osteopathic Medicine's additional location in Great Falls, Montana.
- Two new COMs were approved to begin recruitment, Baptist University of Health Science College of Osteopathic Medicine in Memphis, Tennessee, and Duquesne University College of Osteopathic Medicine in Pittsburgh, Pennsylvania. A new site, Burrell College of Osteopathic Medicine's additional location in Melbourne, Florida, was also approved to begin recruitment.
- The COCA conducted 4 site visits virtually, 8 in-person site visits, and 5 hybrid site visits (combination of virtual and in-person) during the 2022-2023 academic year.
- The COCA convened two task forces between August 2022 and June 2023. The first taskforce was charged with examining COCA standards with an eye towards ensuring quality medical education in an increasingly dynamic marketplace and making recommendations for changes to standards, as needed. The second taskforce was established to analyze COCA's role as an institutional accreditor and make recommendations for adjustments, as appropriate.

Bureau of Osteopathic Education (BOE)

- The BOE provided guidance on the full continuum of osteopathic medical education (predoctoral, postdoctoral, and continuing medical education).
- The BOE provided continued oversight on the implementation of Osteopathically Distinct CME that started in January, 2023.
 - Including monitoring and evaluating first year implementation of the new faculty requirement.
- The BOE reviewed 2018 House of Delegates resolutions through its sunset review process.
- BOE members served as clinical content reviewers for AOA and dually accredited CME activities.

Council of OMED

- The Council of OMED provided governance oversight with respect to the annual OMED conference in 2022.
- OMED22 was the first in-person OMED since 2019, and the AOA's first hybrid conference.
- 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 OMED22.



Report of the Department of Educational Affairs
Robert S. Dolansky, DO, Chair
July 2023

- Final registration was 6,885 attendees - a 20% increase from 2021. Of these attendees, 3,511 were DOs.
- 240 residents attended as well as the largest number of osteopathic medical students in the history of OMED - 1,962.
- AOA offered new tracks in 2022:
 - Partnered with the American Society of Hematology for a track presented by all DO faculty.
 - Innovation Track presented by AOIA.
 - Pre-Medical Student Track presented by SOMA.
 - Culturally Competent Care Track presented by AOA staff.
- Educational content included the following:
 - 250+ hours of CME.
 - Dually accredited.
 - On demand access through December 31.
 - 30 hours of AOA Category 1-A credits and 20 hours of AOA Category 1-B credits or 50 hours *AMA PRA Category 1 Credit™*.
 - Bonus 10 hours of Category 1 CME credit for in-person attendees.
- The Council participated with AOA leadership in the selection of keynote speakers.
- Presently the council is providing governance oversight to OMED23 which will be launched as a hybrid, three-day conference as it was in 2022. The conference will be held October 6-8 in Orlando, FL. All AOA specialty college affiliates are participating in OMED23, and the content will span 23 medical specialties.

Bureau of Osteopathic Specialists (BOS)

- The BOS provides governance oversight to the AOA's 16 specialty certifying boards, which offer certifications in 27 primary specialties and 48 subspecialties. The full BOS convened for its Annual meeting in November 2022 and for its Midyear meeting in April 2023.
- The BOS submitted extensive amendments and updates to the Handbook of the BOS to the AOA Board of Trustees which were approved in March 2023. The 13th edition of the Handbook of the BOS is posted to the [BOS webpage](https://certification.osteopathic.org) on certification.osteopathic.org.
- Over 31,000 AOA board certified diplomates participate in the AOA Osteopathic Continuous Certification (OCC) process. The current OCC cycle began January 1, 2022, and will conclude December 31, 2024.
- The following Committees report to the BOS:
 - BOS Appeal Committee
 - BOS Conjoint Certification Oversight Committee (CCOC)
 - BOS Executive Committee
 - BOS Jurisdiction Committee
 - BOS Standards Review Committee (SRC)
- The BOS Executive Committee, which acts on behalf of the full BOS between meetings, and the SRC convene each month in between full BOS meetings. Actions taken by BOS committees were adopted by the full BOS at the Annual and Midyear Meetings respectively.



Report of the Department of Governmental Affairs
James M. Lally, DO, Chair
July 2023

This report highlights the activities of the Department of Governmental Affairs from August 2022 to June 2023.

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 two in-person meetings this year. 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 more than 20 grassroots advocacy campaigns and more than 50 letters, many of which were organized in partnership with osteopathic affiliates. Collectively, these efforts led to important public policy wins in the federal level that benefit osteopathic physicians and students, and the patients they serve. These include:
 - Preventing a major cut to the Medicare payment rates Going into 2023, physicians were facing a series of cuts that cumulatively would have decreased Medicare payment rates by 8.50%. AOA advocacy initiatives helped prevent an across-the-board cut of 6.5% from taking effect on January 1, 2023.
 - Partnering with key stakeholders to support enactment of legislation requiring states to provide children with 12 months of continuous coverage under Medicaid and the option for states to provide 12 months of continuous postpartum coverage.
 - Advocating for telehealth flexibilities which resulted in a two-year extension for numerous Medicare telehealth services that were only temporarily available during the COVID-19 Public Health Emergency. These telehealth services and coverage will now be available through December 2024.
 - Successfully enacting legislation that includes funding for the distribution of 200 additional Medicare-funded graduate medical education residency positions.
 - Nominating and securing the appointment of a DO to the Centers for Disease Control and Prevention's Healthcare Infection Control Practices Advisory Committee (HICPAC), which provides advice and guidance to the Department of Health and Human Services and CDC on infection control practices and strategies



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July 2023

- for surveillance, prevention, and control of healthcare-associated infections, antimicrobial resistance, and adverse events in US healthcare settings.
- Following years of advocacy with CMS to address prior authorization, including 2 AOA letters and an affiliate letter with 48 co-signers in 2023, CMS finalized rules this year to improve prior authorization (PA) in Medicare Advantage. These changes include aligning PA requirements with Medicare fee-for-service coverage rules, setting new guardrails around how requirements and coverage criteria are developed, and requiring adverse decisions to be reviewed by a relevant expert.
- Leading advocacy efforts that helped secure the introduction and adoption of Senate Resolution 162, designating the week of April 17-23, 2023, as National Osteopathic Medicine Week.
- Lastly, the BFHP reviewed and submitted resolutions for the 2023 House of Delegates, of which, 22 were sunset policies, 2 of which the bureau recommended to be amended and 1 for sunset. The BFHP also submitted a new resolution on non-compete clauses in physician contracts for the House's consideration.

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 3 meetings this year, where the council provided input on regulatory developments impacting AOA members and AOA comments on regulatory proposals. Issues that the council addressed included physician payment, prior authorization and regulatory relief, regulation of health information technology (including electronic health records and clinical decision support tools), continuation of telehealth flexibilities, a federal ban on non-compete clauses, and restrictive private payer coverage policies that would impose new documentation requirements or expand prior authorization for services.
- CERA guidance supported development of 9 regulatory comment letters submitted by AOA to federal agencies, 3 of which were submitted in partnership with affiliates. AOA advocacy, in partnership with affiliates and other physician groups, supported CMS extending coverage of temporary telehealth services through the end of 2023, as well as the Drug Enforcement Agency extending temporary flexibilities for 6 months as it considers approaches to supporting telemedicine prescribing. The CERA will lead AOA's engagement on the CY 2024 physician fee schedule and continue to advocate for appropriate payment for telehealth services.
- CERA input supported development of educational resources on the physician fee schedule and changes resulting from unwinding of the PHE.
- The CERA's input on proposed changes to the 2023 Medicare Physician Fee Schedule, supported changes to payment rules, including E/M coding and documentation, new chronic pain management service codes, payment for opioid treatment programs, and implementation of MIPS Value Pathways under the Quality Payment Program. Comments and positions on policy proposals 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.



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- Reflecting a significant advocacy win, CMS finalized rules this year to improve prior authorization (PA) in Medicare Advantage. These changes include aligning PA requirements with Medicare fee-for-service coverage rules, setting new guardrails around how requirements and coverage criteria are developed, and requiring adverse decisions to be reviewed by a relevant expert. The change followed substantial efforts by AOA in 2023, where CERA's leadership guided 2 AOA letters and an affiliate letter with 48 co-signers, and years of broader advocacy on PA reform.
- Lastly, the CERA reviewed and submitted resolutions for 19 Sunset Policies for the 2023 House of Delegates, 5 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 provided input on the development of the AOA's annual state government affairs priorities, which include:
 - Opposing scope of practice expansion attempts by non-physician clinicians and the creation of shortcuts to physician licensure.
 - 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; and
 - Supporting the authority and autonomy of state medical licensing boards to regulate the profession without legislative interference.
- 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 21 letters and 9 grassroots alerts in 10 states this past year. So far, these activities have resulted in an 81% success rate, with several measures outstanding until those states adjourn for the year.
- Wins this year include:
 - Defeating scope of practice legislation in four states.
 - Defeating shortcuts to physician licensure in two states.
 - Enacting a \$1 million noneconomic medical malpractice damages cap in one state.
 - Increasing Medicaid payment rates in one state.
- Lastly, the CSHA reviewed 9 new resolutions and 10 Sunset Policies for the 2023 House of Delegates, three of which the council recommended be amended to reflect current data and best practices.



Report of the Department of Membership
Julieanne P. Sees, DO, Chair
July 2023

This report highlights activities of the Department of Membership from August 2022 to June 2023.

Bureau of Emerging Leaders (BEL)

- In addition to the 16 members appointed to the Bureau of Emerging Leaders (BEL), there are 40 additional osteopathic medical students, residents, fellows, and new physicians in practice engaged with the BEL's work.
- BEL members have collaborated with AOA departments on a variety of programs and initiatives, providing input on member value services, board certification, the AOA mobile app, and OMED 2022 topics. BEL continues its collaboration with SOMA and COSGP to amplify the student voice.
- Advocacy
 - Held a Public Policy Roundtable in May 2023 in partnership with the AOA Department of Public Policy with over 50 participants 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.
 - Newsletter themes include Mental Health and Wellness (Winter), Transformations/Transitions (Spring), Leadership (Summer), and Mentorship (Fall).
 - The workgroup started several new concepts for the newsletter, including articles supporting the quarterly themes, a Creative Corner to showcase readers' talents, and trivia with AOA swag as prizes.
- Resolutions
 - Submitted a resolution to the AOA Board of Trustees that was approved to go to the House of Delegates:
 - Exploring the impact of virtual residency interviews on the osteopathic residency match rate.
- Scholarships
 - The 2022 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 2023 DO Day Scholarship Program, in collaboration with AOIA, provided complimentary DO Day registration and travel reimbursement to two resident recipients, along with an exclusive virtual opportunity to network with AOA leadership prior to DO Day.
 - The 2023 OMED Scholarship Program application has launched, and the application due date is July 21.
 - The BEL has started to review the scholarship programs to assess viability and return on investment.
 - 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
Julieanne P. Sees, DO, Chair
July 2023

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 continues to recruit new members for our specialty colleges and state osteopathic associations on its dues invoices, which led to a successful year of 637 new members and over \$240,000 in dues revenues.
- The AOA mobile app has internal operations gone through an uplift via the development of a new strategy to enhance content, improve engagement and drive increase of new users.
- Phone system changes- systemic changes were made to our phone systems to enhance the member experience and get callers to a live person for assistance and minimize being bounced around and going to voicemails.
- Membership has been focused on engaging and recruiting young professionals and students.
- AOA has committed to enhancing, attracting, and engaging with young professionals and invested into an 8-week Membership Cohort Program where internal leaders participated and gained further understanding on how to identify expectations and pain points for young professionals and uncover the value for your young professionals.
- A Member Satisfaction Survey was developed to gain further insight into satisfaction levels, identify gaps (needs and expectations), and build member value.
- A membership workgroup was established to assess the current member value, develop/facilitate focus groups to create and deliver a member value proposition to guide member recruitment and engagement initiatives.
- Our Membership team recently developed a partnership with organization by the name of Feathr to boost our digital marketing efforts to recruit and engage current and prospective members in the osteopathic profession. We are optimistic that this partnership will increase awareness and have a positive impact on our recruitment efforts.

Bureau of International Osteopathic Medicine (BIOM)

- The bureau continues its work with the help of Chair Kevin de Regnier, DO, 13 Bureau members, and one Advisor position. AOA Vice President of State and International Affairs, Raine Richards, continues to provide support to the Bureau.
- The main goal of the Bureau is to expand international recognition of US-trained DOs. To that end, BIOM leadership continues to work with AOA leadership and the Canadian Osteopathic Association on the issue of DO licensure in Canada. Pathways to licensure do exist for DOs; however, they vary from province to province, they may not recognize AOA residency training and/or board certification, and additional testing beyond COMLEX and USMLE may be required.
- The AOA is still awaiting a response to letters that were sent to the Federation of Medical Regulatory Authorities (FMRAC) on December 28th and March 22nd; however, Raine Richards was able to make contact with FMRAC Interim Executive Director, Dr. Marcie Lorenzen, and College of Physicians and Surgeons of British Columbia Registrar, Dr. Heidi Oetter, during the Federation of State Medical Boards (FSMB) meeting in Minneapolis in May. During the meeting, Dr. Oetter requested information about AOA Family Medicine residency programs and board certification (which has been provided), signaling a potential opening for greater recognition of DO credentials in British Columbia.



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Julieanne P. Sees, DO, Chair
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- In addition to her role in Canada, Dr. Oetter is also the current Chair of the International Association of Medical Regulatory Authorities (IAMRA), and the AOA is actively working with various constituents (including the FSMB and the Association of Medical Councils of Africa) to bring forward a DO-MD equivalency resolution at the upcoming biennial meeting of IAMRA in November. The resolution will be based on a similar resolution that AMCOA passed in 20 countries across Africa in 2018, and influential AMCOA leaders who currently sit on the IAMRA Board of Directors have indicated their interest in partnering with us to get a resolution passed at IAMRA this year.
- In addition, the Bureau met in April to review and approve the 2017 Sunset Policy that was assigned to it, H349-A/18 Volunteer Osteopathic Medical Health Care Delivery - Terminology. Potential topics and speakers for the annual BIOM lecture at OMED were discussed, including medical tourism, the Korean Society of Chuna Manual Medicine and an international update from Osteopathic International Alliance leadership and AOA staff. Another strategic goal of the BIOM is to provide ongoing support to the OIA and given AOA's recent activity and progress on the aforementioned international initiatives, an update on OIA and AOA International may be of particular interest to our audience.
- The BIOM also launched its 25th annual global health abstract competition – which is generously co-sponsored by SOMA and COSGP – on June 19th. All osteopathic medical students and residents are invited to submit an unpublished global health abstract or narrative medicine essay by July 31st, for a chance to win Best Overall as well as First and Second place cash prizes in each category. All participants will have a chance to create posters based on their abstracts for inclusion in the OMED virtual poster exposition, and the winners will present their posters live on the platform on October 6th. Similar to last year, the BIOM will consider abstracts reflecting work with migrant and/or refugee populations within the United States as schools and residency programs work to re-implement international opportunities following the pandemic.
- On that note, the BIOM is also in the process of conducting its annual COM survey in order to assess the progress that schools have made to re-implement their international programming, which will help us reevaluate the need for this accommodation in next year's competition. The survey also queries schools about the percentage of students who choose to go abroad, what type of assistance and training is available to them, as well as about partnerships that the school has developed with programs and institutions in other countries.



Report of the Department of Research and Public Health
Sonia Rivera-Martinez, DO, Chair
July 2023

This report covers the activities of the Department of Research and Public Health from August 2022 to June 2023.

Bureau of Osteopathic Research and Public Health (BORPH)

Research activities

Research Grant Funding

- 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.
- Thirteen (13) grant applications were received and reviewed by external reviewers and BORPH. After approval by the AOA BOT, seven applications will be funded for FY 2023.

2022 Research Poster Session and Student Competition held virtually during OMED

- Each spring, the AOA announces a Call for Research Abstracts for poster presentations at OMED in the Fall. The abstract categories include Basic Science Research, Clinical Research, Health Services Research, and a new category on Public Health Research.
- The Public Health Research category was added in 2022 to focus research on Social Determinants of Health (SDOH) and health disparities. The Call for Research Abstracts was posted in May 2022 for posters to be presented at OMED 2022.
- 119 abstracts were received and peer reviewed. 94 abstracts (79%) were approved. For the new Public Health category, 27 abstracts were submitted and 20 approved.
- The Research Poster Session and Student Competition was held on October 28, 2022 during OMED using a virtual format.
- Of the 94 approved abstracts, 85 were from osteopathic medical students who entered the student poster competition.
- 23 judges in teams of two evaluated student presenters at assigned times.
- Three students were awarded first place prizes.
- Six students were awarded second place prizes.
- 2 AOA Category 2B credits are approved to view posters through September 2023. The posters can be found on AOA Online Learning. <https://aoaonlinelearning.osteopathic.org/>
- The research abstracts were published in the December 2022 issue of the Journal of Osteopathic Medicine. <https://jom.osteopathic.org/>



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- For more information on the Research Poster Session and Student Competition winners, visit the AOA website. <https://osteopathic.org/life-career/osteopathic-research/aoa-research-track/omed-2022-posters/>

Public Health Activities

BORPH made recommendations to the AOA Board of Trustees (BOT) to approve three public health initiatives. The Department of Research and Public Health and Strategic Partnerships and Health Initiatives partner in the planning and implementation of the BORPH public health initiatives. The three public health initiatives are listed below.

Immunization promotion and vaccine hesitancy

Strategic Partnerships and Health Initiatives was successful in receiving funding to address immunization promotion and vaccine hesitancy. Funding was received for the following activities:

- COVID-19 Facts on Vax Initiative addressing vaccine hesitancy. <https://osteopathic.org/practicing-medicine/providing-care/factsonvax/>
- Influenza prevention efforts including promotion of vaccines in underserved communities.
- Education on effective RSV prevention and COVID-19 treatments including presentations during DO Day.
- The BORPH reviewed three grant funded toolkits developed by Strategic Partnerships and Health Initiatives on the topics of RSV, COVID-19 Prevention & Treatment, and Osteopathic Physicians' Use of Social Media in Professional Practice.

Awareness of social determinants of health (SDOH) and health disparities in minorities

In addition to topics related to social determinants of health (SDOH) and health disparities described in the Living Well/Aging Well series summary below, Strategic Partnerships and Health Initiatives led mental health and behavioral health initiatives targeting physicians, patients, and the public. These activities include:

- Co-leading development and implementation of the DEI and SDOH track at OMED22.
- Partnering with other physician organizations on the AMA's Behavioral Health Initiative addressing mental health issues.
- Collaborating with the Advocates for the American Osteopathic Association and the National Alliance on Mental Illness to focus on physician and patient mental health.

Living Well/Aging Well

The Living Well/ Aging Well initiative addresses the role of osteopathic distinctiveness in body, mind, & spirit, healthy aging, and overall wellness.

- To address this public health initiative, the BORPH developed 11 informational sheets for physicians to use when talking to patients and as handouts for patients. These 1-2 page handouts focus on the following health topics:



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- Cancer detection and screening including:
 - Breast cancer
 - Cervical cancer
 - Colorectal cancer
 - Testicular cancer
 - Prostate cancer
 - Lung cancer
 - Skin cancer
 - Genetic Screening for Cancer
- Role of physical activity in promoting mental health, disease prevention, and healthy aging.
- Addressing the mental health of patients.
- Healthy nutrition on a budget to address food insecurity.

The patient handouts will be posted to the AOA website in the next few months.

Osteopathic Physician and Medical Student Wellness Toolkit (update)

In 2022, the BORPH developed an Osteopathic Physician and Medical Student Wellness Toolkit to address physician, resident, and student mental health and wellness. The final toolkit can be accessed on the AOA website at <https://osteopathic.org/life-career/wellness-toolkit/>.

Policy Review

- BORPH reviewed and made recommendations on 27 sunset policies for the 2023 House of Delegates (HOD) meeting.
- The House of Delegates referred Sunset Policy Res. No. H-424-A/2022 Policy Statement on End of Life Care - Source: H438-A/17 to the BORPH. The Bureau made updates to the white paper and added references.



103rd House of Delegates Annual Meeting

Saturday, July 22, 2023

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
	Credentials Committee Report	Mark E. Eastman, DO, Chair Scott S. Cyrus, DO, Vice Chair
	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 / 2024)
	▪ First Vice President	(one year term / 2024)
	▪ Second Vice President	(one year term / 2024)
	▪ Third Vice President	(one year term / 2024)
	<u>AOA Board of Trustees</u>	
	▪ Name (expired term / 2023)	(three-year term / 2026)
	▪ Name (expired term / 2023)	(three-year term / 2026)
	▪ Name (expired term / 2023)	(three-year term / 2026)
	▪ Name (expired term / 2023)	(three-year term / 2026)
	▪ Name (expired term / 2023)	(three-year term / 2026)
	▪ Name (expired term / 2023)	(three-year term / 2026)
	▪ New Physician in Practice	(one year term / 2024)
	▪ Postdoctoral Trainee	(one year term / 2024)
	▪ Student	(one year term / 2024)
	<u>Officers of the House of Delegates</u>	
	▪ Ray L. Morrison, DO, Speaker of the House	(one year term / 2024)
	▪ David L. Broder, DO, Vice Speaker of the House	(one year term / 2024)
	Meeting Recess (AOIA Election & OPAC)	
	Meeting Reconvenes	Ray L. Morrison, DO, Speaker, House of Delegates
	HOD Committee on Rules and Order of Business	Jeffery J. Dunkelberger, DO, Chair Kenneth A. Heiles, DO, Vice Chair



103rd House of Delegates Annual Meeting
Saturday, July 22, 2023
7:30 am – 3 pm CT | 4 – 5 pm CT

House of Delegates Reference Committee Reports

Ray L. Morrison, DO, Speaker, House of Delegates

- Ad Hoc

Nicklaus J. Hess, DO, Chair
Brian Loveless, DO, Vice Chair

- Constitution and Bylaws

Elizabeth A. Palmarozzi, DO, Chair
Linda F. Delo, DO, Vice Chair

Meeting Break

Meeting Reconvenes

Ray L. Morrison, DO, Speaker, House of Delegates

House of Delegates Reference Committee Reports

Ray L. Morrison, DO, Speaker, House of Delegates

- Constitution and Bylaws

Elizabeth A. Palmarozzi, DO, Chair
Linda F. Delo, DO, Vice Chair

Special Order of Business

Ray L. Morrison, DO, Speaker, House of Delegates

2023 A.T. Still Memorial Lecture

Kenneth Veit, DO

2023 A.T. Still Medallion Presentation

Dawn Tartaglione, DO, President, American Osteopathic Foundation

American Osteopathic Foundation Report

Dawn Tartaglione, DO, President, American Osteopathic Foundation

OPAC Scholarship Presentation

- James Lally, DO, Student Scholarship Recipient

Ronnie B. Martin, DO, Chair, OPAC
James M. Lally, DO

AOA Awards Presentation

- Bob E. Jones, CAE Award
- Distinguished Service Award

Ernest R. Gelb, DO, FACOFP, President

2023 Presidential Citations

Ernest R. Gelb, DO, FACOFP, President

Meeting Recess



103rd House of Delegates Annual Meeting
Saturday, July 22, 2023
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House of Delegates Reference Committee Reports

Ray L. Morrison, DO, Speaker, House of Delegates

- Educational Affairs
- Professional Affairs
- Public Affairs

Lori A. Kemper, DO, Chair
Kenneth Steier, DO, Vice Chair

Andrew D. Adair DO, Chair
William Swallow, DO, Vice Chair

John Kalata, DO, Chair
Kevin Beyer, DO, Vice Chair

3:00 pm **Meeting Recess**

4:00 pm **Meeting Resumes**

Ray L. Morrison, DO, Speaker, House of Delegates

Inauguration of 2023-2024 AOA President
Ira P. Monka, DO, FACOFP

5:00 pm **Meeting Recess**

Ray L. Morrison, DO, Speaker, House of Delegates

6:30 pm **Reception Honoring the 127th AOA President**
Ira P. Monka, DO, FACOFP



103rd House of Delegates Annual Meeting
Sunday, July 23, 2023
7:30 am CT – End of Business

7:30 am	Call to Order / Reconvene Meeting	Ray L. Morrison, DO, Speaker, House of Delegates
	Credentials Committee Report	Mark E. Eastman, DO, Chair Scott S. Cyrus, DO, Vice Chair
	Election: AOA Board of Trustees and Officers	Ray L. Morrison, DO, Speaker, House of Delegates Kathleen S. Creason, MBA, Secretary
	Meeting Recess (AOIA Elections)	Ray L. Morrison, DO, Speaker, House of Delegates
	Meeting Reconvenes	Ray L. Morrison, DO, Speaker, House of Delegates
	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 CommitteeCommittee on Resolutions	Joseph A. Giaimo, DO, MACOI, Chair Richard Thacker, DO, MACOI, Vice Chair Lawrence Prokop, DO, Chair Marc Kaprow, DO, Vice Chair
	Old Business	Ray L. Morrison, DO, Speaker, House of Delegates
	Meeting Adjournment	Ray L. Morrison, DO, Speaker, House of Delegates