This report highlights activities of the Department of Affiliate Relations from August 1, 2019 to July 1, 2020.

Enhanced Communication and Relations with Affiliates
- Quarterly affiliate calls were held in July, October, January, and April, all of which had consistent participation and engagement. In addition to affiliate relations, topics included CME, advocacy and public policy, physician services, certifying board services, governance, resolutions, and membership.
- Affiliate Friday Folder emails have been reformatted to include timely and relevant topics for affiliate leaders. Open rates have increased as a result.
- Surveys were conducted to obtain feedback from affiliates on the ROME conferences and affiliate agreement. In addition, an OMED survey conducted by Dr. Klauer was sent to affiliate leaders.
- Affiliate Town Halls were held in June on the following topics: CME, affiliate agreements, ACCME joint providership and OMED revenue sharing.
- The department changed its name from affiliate “affairs” to affiliate “relations” to better reflect the commitment to ongoing enhanced collaboration with, and support of, AOA affiliates.

Regional Osteopathic Medical Education (ROME) Conferences
- Two ROME conferences were held over the last fiscal year – ROME New England which took place August 8-11, 2019 in Providence, Rhode Island and ROME Rocky Mountain which was held March 5-7, 2020 in Vail, Colorado. Attendees participated in education sessions focused on osteopathic principles and practice, heard from medical and health policy experts, and collaborated with like-minded DOs from across the host region. A third conference, ROME Southeast, was planned for June 11-14, 2020 in Charlotte, North Carolina but was canceled due to COVID-19.

Support of Affiliates as a Result of COVID-19
- The COVID-19 pandemic led to a dramatic increase in contacts from affiliates. The types of requests included meeting contract assistance, moving in-person CME education to virtual meeting platforms, and applying for federal relief funding.
- Advocacy efforts to support affiliates included several Congressional sign-on letters, webinars, and toolkits which were collaborative efforts by the Public Policy and AOIA teams.

Bureau of International Osteopathic Medicine
- The BIOM studied the issues raised in two AOA White Paper documents and prepared updated drafts on these important topics: (1) International Electives; and (2) Principles of International Activity of Osteopathic Physicians
- Provided a forum through its meetings for informational exchange on the activities of AOA and others in the osteopathic family (e.g., COMs, affiliated organizations) on international activities to advance the US model of osteopathic practice internationally.
- In October 2019, BIOM offered the well-attended 2019 International Seminar and Poster Competition at OMED in Baltimore, Maryland
- Planned for educational programing on international issues, including partnering with the ACOFP to present the annual international seminar at OMED with Mr. Colin Rogers, MA, MSc, Head of Disaster Preparedness & Response for Plan International, and President of Sphere, Humanitarian Charter and Minimum Standards in Humanitarian Response, as the keynote speaker. He will be making two presentations:
  - Epidemic Preparedness and Response (COVID will be highlighted!)
  - Response to Violence Against Women and Children During a Humanitarian Crisis. This lecture will be using the crisis in the Sahel as a “case study.”
- Hosted the 22nd annual competition on global health research and narrative medicine – open to students and residents.
Committee on Basic Documents and Operations of Affiliate Organizations

- The Committee has met by telephone conference to review proposed changes to the governing documents of affiliated organizations, as required under the AOA’s Bylaws (Article I, Section 4). This past year, the Committee reviewed documents from 21 state and specialty affiliates.
This report highlights activities of the Department of Business Affairs from August 1, 2019 to June 1, 2020.

Bureau of OMED – OMED19
- The bureau was pleased to report that 89% of OMED19 attendees rated the conference Excellent or Good, and 95% would recommend OMED to colleagues. This was achieved by the bureau’s leadership and the commitment of participating specialty colleges to collaborate with one another to provide high-quality continuing CME programming.
- DO attendance at OMED19 was down by 6% over the previous year, and overall attendance in all categories was down by 27%.
- Through strong fiscal management and reductions in expenses, OMED19 exceeded budgeted net revenue.
- Based on direction from the House of Delegates and specialty affiliates, the bureau designated one full day of programming at OMED19 on wellness. The joint specialty program on wellness was held from 9 am to 2 pm on Monday, Oct. 28, 2019 and well received by attendees. Due to the success of this program, the Bureau of OMED is developing a joint specialty program for OMED20, The Pathway to Integrative Osteopathic Care in Chronic Pain: Across the Generations.

Committee on Administrative Personnel
- Successfully oversaw a reduction in force which resulted in a human capital savings of over $1 million.
- Advised on key personnel changes in a restructuring of the Senior Leadership Team.
- Identified metrics for performance evaluation of the CEO.
- Worked with the CEO on critical personnel issues.

Committee on AOA Governance and Organizational Structures
- Reviewed and evaluated the question of term limits for the Board of Trustees referred to CAGOS by the House of Delegates
- Studied a proposal to modify the current governance structure of departments, bureaus, councils and committees and suggested enhancements to the proposal for consideration by the Board of Trustees
- Discussed and identified steps necessary to implement modifications called for under the proposed changes to governance
- Evaluated a question referred by the Bureau of Emerging Leaders (BEL) concerning the definition of new physician in practice and provided recommendations to the BEL
- Reviewed the issue of appropriate representation within the House of Delegates for the BEL
- Discussed the current mechanism for providing notice to AOA members and affiliates of proposed amendments to the AOA’s Constitution, Bylaws and Code of Ethics and recommending evaluation by the Subcommittee on Constitution and Bylaws

Constitution and Bylaws Subcommittee
- Reviewed the changes to the governance structure (Departments, Bureaus, Councils, Committees) and approved resolutions for consideration by the House of Delegates to amend the current constitution (Article VIII, Section 2) and bylaws (Article IX) necessary to implement the proposal
- Proposed changes to the mechanism for providing notice to AOA members and affiliated organizations of proposed amendments to the AOA Constitution (Article IX), Bylaws (Article XI, Section 1) and Code of Ethics (Bylaws, Article IV, Section 2) for consideration by the AOA House of Delegates (HOD) at the October Special Meeting of the HOD
Finance Committee

- Balance the AOA FY 2021 Operating Budget in FY 2020.
- Implemented the Operating Cash Management Program. FC RES. No 1 October 2019
- Fully anticipate that the annual audit of the FY 2020 AOA financial statements will result in the best opinion achievable*.
- The projected net operating surplus was reported at $1.8 million for FY 2020*.
- The projected reserve balance of $38 million at May 31, 2020 reflected a reserve percentage of 90% of total operating expenses two years earlier as compared to a 75% reserve requirement.*

*Note: As of June 22, 2020 the FY 2020 Audit is in progress.

Strategic Planning Committee

- Revised the strategic themes to focus on ACCME, IT Upgrades and Board Certification during the extension year
- Developed a process for creating a new strategic plan – on hold due to Covid-19
- Transitioned the Star Prize process to the AOA Awards committee
This report highlights the activities of the Department of Education Affairs for 2019-2020. The Department of Educational Affairs oversees four areas of the AOA – Accreditation, Graduate Medical Education, Certifying Board Services, and Physician Education and CME.

Commission on Osteopathic College Accreditation

- The Commission completed and filed its petition for renewal of accreditation authority with the US Department of Education’s National Advisory Commission on Institutional Quality and Integrity
- For the 2020-21 academic year, the COCA accredits 37 colleges of osteopathic medicine (COMs) operating in 58 sites.
  - Two new colleges of osteopathic medicine will begin instruction in the 2020-21 academic year: Sam Houston State University COM and California Health Sciences University COM
  - Three COMs will open additional locations/branch campuses for the 2020-21 academic year: Lake Erie College of Osteopathic Medicine in Elmira, NY, Edward Via College of Osteopathic Medicine in Monroe, Louisiana, Oklahoma State University College of Osteopathic Medicine in Tahlequah, Oklahoma (Cherokee Nation)
- The COCA provided guidance to Colleges of Osteopathic Medicine on compliance with accreditation standards due to disruptions related to the COVID-19 pandemic, including the use of distance education
- COCA updated its policies and procedures manual and the COCA Handbook, both of which are submitted to the Board of Trustees for review and approval
- COCA and the AOA Board of Trustees have renegotiated their Memorandum of Understanding to extend the agreement for an additional 5 years

Bureau of Osteopathic Education

- The BOE heard and acted on resolution from the COPT and COPTI on proposed specialty and OPTI accreditation standards.
- The BOE heard and acted on resolutions from COCME on the revised CME Accreditation Manual, adjustments to the CME guide due to COVID-19, and other CME policies.
- The BOE reviewed 10 policies for the policy sunset process.
- The BOE received reports from its ex-officio members, affiliate osteopathic educational associations, and the progress of the transition to the single GME accreditation system.

Council on Osteopathic Postdoctoral Training

- The COPT reviewed specialty basic standards submitted by specialty colleges for programs that will be under AOA’s restricted accreditation authority after July 1, 2020.
- The COPTI reviewed the necessary changes to the OPTI accreditation standards and handbooks for the OPTIs that will be academically sponsoring programs under AOA’s restricted accreditation authority after July 1, 2020
- With the conclusion of the transition to the single GME accreditation system, the COPT will be disbanded and its responsibilities will be managed by PTRC.
Program and Trainee Review Council

- The PTRC continued to oversee the accreditation of AOA postdoctoral training programs and the approval of training for osteopathic physicians in AOA-accredited programs.
- The PTRC sent a letter to all AOA-accredited programs regarding residents adherence to AOA specialty basic standards due to the COVID-19 pandemic.
- The PTRC continues to closely monitor the ACGME accreditation status of AOA programs that transitioned to the single GME accreditation system, including the number of programs and residents that will continue to be under the accreditation authority of the PTRC.

Council on Osteopathic Postdoctoral Training Institutions

- The COPTI surveyed all OPTI Executive Directors and Chief Academic Officers on each OPTI accreditation standard to provide feedback on whether the standard should remain, be eliminated, or be revised for OPTIs that will still be the academic sponsor of programs that will be under AOA’s restricted accreditation authority after July 1, 2020.
- Using this feedback, the COPTI revised and eliminated 28 standards.

Council on Osteopathic Graduate Medical Education Development

- In collaboration with the AACOM’s Assembly of Graduate Osteopathic Medical Educators (AOGME), the COGMED sent a survey regarding Osteopathic Recognition resources to all AOA programs that achieved ACGME accreditation, as well as ACGME programs with a high percentage of DO residents. A similar survey was also sent to programs with Osteopathic Recognition.
- The COGMED also reorganized its website and key points for programs to apply for Osteopathic Recognition.

Physician Education and CME

- The Physician Portal - Manage CME function has been in final development. Testing and editing have occurred, along with functionality improvements. The system will allow for Self-Reporting of Category 2 credit with real-time updates made to CME reports. The Request for Approval of Category 1 activity feature will also be present, and it allows for 5-7 business day posting. The planned release is Jul 2020.
- ACCME Joint Providership Accreditation Program has been finalized. Presentations have been made to Department of Educational Affairs, leadership and SOSE/AOSED leaders.
- ACCME reaccreditation process is underway. The Self-Study was submitted 3/23/2020 and live Interview is scheduled for 6/29/2020.
- Two online OMM learning activities have been created and launched. This was a partnership with AAO – AOA. They have dual accreditation (AOA/AMA PRA Category 1™).

Council on Osteopathic Continuing Medical Education

- Reviewed four Category 1 CME Sponsors for re-accreditation. Three AOA Category 1 CME Sponsors were approved for re-accreditation and one was granted an extension until July 1, 2020 to comply with the submission of the document survey materials.
• Approved the Arkansas College of Osteopathic Medicine (ARCOM) 10/2019 and Burrell College of Osteopathic Medicine (BCOM) 3/2020 for 1-year accreditation. There are 163 AOA Category 1 CME Sponsors.
• Approved four resolutions (10/2019) for consideration as noted for the July 2020 BOT Meeting:
  1. The revised Accreditation manual as approved
  2. Resolution to hold the CME Sponsors Conference at other osteopathic events
  3. Approved AOA Category 1-A CME credit for “item writing” with a cap of 20% and to earn CME credit the physicians must develop six questions that are high stake in
  4. Approved a resolution stating for topics for which the American Osteopathic Association (AOA) has specific policy endorsing or encouraging continuing medical education, the required needs assessment conducted by accreditors need only refer to the specific AOA policy.
• Waived the requirement for sponsors to attend a CME sponsor conference for the 2019-2021. The CME Sponsors will be mandated to attend a CME Sponsors Conference during the 2022-2024 CME cycle
• Approved AOA Category 1-A CME credit for OMT teaching and lab teaching based on clarification of policy for osteopathic teaching
• Approved *The AAO Journal* to receive AOA Category 1-B CME credit for peer reviewers and any other AOA Category 1 CME Sponsors requesting CME credit in align with the *JAOA Journal*.

Bureau of Osteopathic Specialists
This report highlights activities of the Bureau of Osteopathic Specialists (BOS) and the various committees that report up to the BOS from March 1, 2020 to June 1, 2020.

Appeal Committee
• The Appeal Committee convened for the first time ever on a virtual platform due to the COVID-19 pandemic. The Committee met on April 24, 2020 where they heard and acted on two appeals.

Certification Compliance Review Committee
• The Certification Compliance Review Committee (CCRC) met on June 2, 2020 to consider a request for certification reinstatement.

BOS Executive Committee
• The BOS Executive Committee convenes on a monthly basis.
• The Committee heard reports and acted on items related to:
  • Requests for board eligibility extension;
  • Addiction Medicine reports (Practice Analysis, Test Specifications, Eligibility Requirements, and Technical Report);
  • Memo of Support for the COCME Item Writing Resolution;
  • Worked with CBS to ensure that none of the candidates and diplomates are harmed by the COVID-19 crisis (extended board eligibility, eliminated PPA requirements, extended certifications, etc. requirements for one year);
• Request to participate in subspecialty exam prior to obtaining primary certification due to COVID-19;
• Specialty Board Member nominations;
• Initial review and comments related to Article II Amendments; and
• Initial review and comments related to BOS New Handbook Policies Amendments.

Standards Review Committee (SRC)
• The SRC convened three times over the past four months. The Committee considered and acted on several items, most notably:
  • Addiction Medicine reports (Practice Analysis, Test Specifications, Eligibility Requirements, and Technical Report);
  • 2022-2024 Proposed CME Requirements;
  • Splitting of Certificates; and
  • OMT for Lapsed Certifications.

Bureau of Osteopathic Specialists (BOS)
• A special meeting of the full BOS was held in March to consider proposed policies that were subsequently posted for open comment. The BOS then convened virtually for the first time for its Midyear Meeting in April which was widely heralded as a success. During the Midyear Meeting the BOS heard reports and updates from AOA leadership, the Department of Certifying Board Services and various committees and task forces. The BOS acted on items related to:
  • Executive Committee Size
  • Article II Amendments
  • BOS New Handbook Policies Amendments
This report highlights the activities of the Department of Governmental Affairs from August 1, 2020 to June 1, 2020.

Bureau on Federal Health Programs

- As part of the September 2019 department tri-bureau meeting, the bureau received the following reports:
  - Elizabeth Murry and Jennifer Young, AOA government relations consultants with Tarplin Downs and Young, presented and answered questions from bureau members on Congressional and Administration health policy activities.
  - Andrew Pincus, a supreme court litigator with the firm Mayer Brown, spoke about the future of the Affordable Care Act and the potential impact of Texas v. Azar.
  - Maggie Elehwaney, vice president for government relations and policy with the National Rural Health Association, presented on the impact of hospital consolidation.
- Throughout the year, the Bureau provided input and guidance to AOA staff on plans for DO Day and physician engagement. This past year, the AOA held a fly-in in September 2019 for osteopathic specialty affiliate leaders and launched the Osteopathic Advocacy Network (OAN), a program designed to increase member participation in AOA advocacy.
  - The fly-in took place the day before the public policy tri-bureau meeting, which allowed for most bureau members to participate in the fly-in. Twelve specialty affiliates participated; attendees covered 16 states, 52 Congressional districts, and helped secure new cosponsors for prior authorization and THCGME legislation.
  - The OAN was launched following the 2019 Housed of Delegates and saw activity and participation increase as the year progressed. The AOA offered in-district meetings with members of Congress and Congressional staff during three different in-district work periods this year. Additionally, during the COVID-19 emergency, AOA staff tracked Congressional townhalls, and facilitated OAN member participation in 26 Congressional townhalls. More recently, AOA staff has begun holding public policy roundtable discussions with OAN members to build a stronger relationship with our advocates and provide insight on public policy that impacts the osteopathic profession and their patients.
- The Bureau submitted new and revised language in response to two referred resolutions and one passed by the 2019 HOD directing the AOA to submit information to the 2020 HOD. The resolutions focus on the following issues:
  - Government Response to Victims of an Epidemic or Terrorist Attack
  - Background Checks and Firearms Safety Training as a Condition of Firearms Purchase
  - Firearms Policy
- In total, the Bureau reviewed and approved 26 sunset resolutions, including 4 with amendments.

Bureau of Socioeconomic Affairs

- 2020 Medicare Physician Fee Schedule - The Bureau provide leadership in guiding recommendations to CMS on proposed and final policy and payment changes for office and other outpatient Evaluation and Management (E/M) visits. Bureau members played a vital role in the development of national clinical documentation guidelines for E/M visits that will be used by physicians and non-physician health care providers across all medical specialties for years to come.
- MIPS Value Pathways (MVPs) – The AOA partnered with the Centers for Medicare and Medicaid Services (CMS) and the American College of Surgeons (ACP) on the development of a new framework for the MIPS program for chronic and preventive care services. Members of the BSA contributed to the MVP framework and participated in meetings with CMS and ACP.
- Ad Hoc Health IT Workgroup – The BSA took the lead on convening representatives of each of the public policy bureaus and the AOIA to assist with the review and development of HIT resources.
• Primary Care First Value-based Payment Model – The AOA partnered with the CMS Innovation Center to present information on this new payment model to AOA members. The vice-chair of the BSA co-hosted the webinar.

• The Bureau submitted new language in response to three referred resolutions for submission to the 2020 HOD. The resolutions focus on the following issues:
  o Managed Care Plans
  o Obesity Treatment Reimbursement in Primary Care
  o Prior Authorization and Utilization Management Reform

• In total, the Bureau reviewed and approved 20 sunset resolutions, including 10 with amendments.

Bureau of State Government Affairs

• A significant step forward in AOA advocacy efforts this year was the result of leadership from the BSGA’s State Grassroots Advocacy Taskforce and the continued development and growth of the AOA’s collaboration with state osteopathic associations on state government affairs grassroots advocacy. Under the leadership of the Bureau, the AOA partnered with four state osteopathic associations on seven state grassroots advocacy alerts in FY19. In FY20, the AOA partnered with ten state osteopathic associations on 17 grassroots advocacy alerts. These numbers represent more than a 100% increase, and led to at least 2,962 individual emails to state lawmakers and governors.

• The Bureau submitted new language in response to two referred resolutions and several sunset resolutions for submission to the 2020 HOD. The resolutions focus on the following issues:
  o Use of the term ‘physician’, ‘doctor’, and ‘provider’
  o Regulation of E-cigarettes and Nicotine Vaping
  o Access to Care – Network Adequacy and Coverage
  o Intractable and/or Chronic Pain (Not Associated with End-of-Life Care)
  o Professional Liability Insurance Reform

• In total, the Bureau reviewed and approved 20 sunset resolutions, including 14 with amendments.

Public Policy Tri-Bureau

• Under the Tri-Bureau’s leadership, the AOA public policy department submitted secured important legislative and regulatory wins on behalf of the osteopathic profession this past year. These public policy accomplishments were the cumulative result of dozens of legislative and regulatory comment letters, hundreds of meetings with lawmakers, and more than 13,000 individual grassroots communications from DOs and osteopathic medical students across the country to their lawmakers. Highlights include:
  o The defeat of scope of practice legislation in Arizona, Arkansas, Louisiana, and Michigan.
  o Passage of liability reform legislation in Tennessee, with legislation pending in several other states.
  o Passage of federal COVID-19 legislation that included financial relief for physicians, expansion of telehealth payment and utilization, liability protections, and funding for PPE.
This report highlights activities of the Department of Professional Affairs from August 1, 2019 to June 1, 2020.

Bureau of Emerging Leaders

- Created networking events at HOD and OMED that connected postdoctoral trainees and new physicians in practice to the leaders in the profession, osteopathic organizations, and each other.
- In collaboration with AOIA and OPAC, the BEL created a new scholarship for postdoctoral trainees to attend DO Day. There were 60 applicants and 5 will be selected.
- Continued its OMED Scholarship Program for a third year with a new class of 10 recipients for OMED 20. Highest applicant total in the 3 years of the program (25).
- Is fielding an Early Career Physician Engagement survey that will provide data for a white paper on Early Career Physician Engagement within AOA affiliates.
- Focused on enhancing the SOMA/COSGP/AOA relationship with an emphasis on resolutions through consistent, direct engagement to the leadership of both organizations.

Bureau of Membership

- Achieved goal of 80% retention of current members from FY19 to FY20.
- Deployed the 2020 Membership Survey to gauge satisfaction with AOA programs, products, and services, as well as to determine initial interest in a “tiered” membership model and offerings.
- Completed development of Member Engagement Scoring tool to enable analysis of member engagement by various key segments and enhance communication to “at risk” segments.
- Exceeded the FY20 membership revenue budget.

Ethics Subcommittee of the Bureau of Membership

- The Ethics Subcommittee meets on an ad hoc basis to review complaints about ethical misconduct on the part of AOA members or to review questions about ethics issues referred by the AOA President or Board of Trustees
- This past year, the Ethics Subcommittee reviewed and adjudicated two complaints regarding alleged misconduct on the part of AOA members. (The Subcommittee’s deliberations are confidential.)
- The Subcommittee also was asked to review three sunset resolutions from the House of Delegates. In response to one of the resolutions, the Subcommittee is reviewing certain sections of the Code of Ethics to assess their ongoing relevance.

Committee on Awards

- The Committee on Awards confirmed recipients for the following AOA awards and forwarded names to the AOA Board of Trustees for Approval: Mentor of the Year, Distinguished Service Award, Allaby (DOCARE) Award, Northup Award and STAR Awards.
- The committee also provided recommendations for the A.T. Still Lecturer that will present during the virtual House of Delegates Meeting in October.
- The committee also considered a new award entitled the COVID-19 Initiative Award.
This report covers the activities of the Department from July 2019 to June 2020.

AOA Physician Wellness Task Force

- The AOA Physician Wellness Task Force is finalizing a Toolkit and five Train-the-Trainer CME modules. The target audience includes all physicians-in-training, physicians, and key stakeholders.

- The modules cover the importance of developing and maintaining wellness throughout the life cycle of physicians, addressing the generation gap and other differences potentially influencing wellness, effective mentoring, wellness of the trainer, and changing the medical culture. Additional topics include recognizing the signs of burnout and identifying the warning signs of depression and suicidal ideation.

Bureau of Osteopathic Clinical Education and Research

- The Bureau awarded five research grants: two in the research focus areas of OMM/OMT and Acute and Chronic Pain, and three grants in the “pipeline” program were awarded to one student, one physicians in training, and one new investigator. The total amount awarded is $273,610.00.

- The Bureau reviewed and made recommendations to four sunset policies for the 2020 House of Delegates (HOD) meeting. The Bureau’s responses include a request for an extension on the revision of the Low Back Pain Clinical Practice Guidelines until the July 2021 HOD.

Bureau of Scientific Affairs and Public Health

- The Bureau partnered with several interdisciplinary health professional organizations to provide AOA affiliates, grant funded CME programs that included stipends as well as education to their constituents during their respective meetings and conferences. The programs completed during the reporting period include the NIDAMED online course, funded by the National Institute of Drug Abuse (NIDA); 21 CO*RE REMS courses, funded by the REMS Pharmaceutical Companies (RPC); and 2 Building Pain Pathways seminars, funded by an independent educational grant from Pfizer and Eli Lilly.

- The Bureau collaborated with 8 affiliates to create public health focused CME on trauma informed care practice (TCIP) and Adverse Childhood Experiences (ACEs) at the 2019 OMED. AOA funded travel costs and honoraria to support the speakers.

- The Bureau reviewed and submitted recommendations for 39 sunset policies for the 2020 House of Delegates meeting. The Bureau also wrote 4 policy papers in response to HOD policies referred at the 2019 HOD meeting. The subject matter for the policy papers included: CME on postpartum depression, increasing underrepresented minorities in osteopathic medical schools, legislation of e-cigarettes and vaping, and breastfeeding while on medicine assisted treatment (MAT). The Bureau also prepared 1 new resolution for consideration at the 2020 HOD. The proposed resolution encourages Buprenorphine waiver training for medical students.