102nd Annual Meeting of the Board of Trustees General Session and House of Delegates Annual Meeting  
Chicago Marriott Downtown Magnificent Mile Hotel, 540 N. Michigan Avenue, Chicago, IL 60611

All times listed below are Central Time.  
*Subject to Change

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>8 – 9 am</td>
<td>Board of Trustees Breakfast (All Invited)</td>
<td>Marriott, Chicago E, 5th Flr</td>
</tr>
<tr>
<td>9 am – 12 pm</td>
<td>Board of Trustees General Session Meeting</td>
<td>Marriott, Chicago A-D, 5th Flr</td>
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<tr>
<td></td>
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<td>Zoom (Virtual Participation)</td>
</tr>
<tr>
<td>12 – 1 pm</td>
<td>Board of Trustees Lunch (All Invited)</td>
<td>Marriott, Chicago E, 5th Flr</td>
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<tr>
<td>1 – 3 pm</td>
<td>Board of Trustees General Session Meeting</td>
<td>Marriott, Chicago A-D 5th Flr</td>
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<td>Zoom (Virtual Participation)</td>
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</tbody>
</table>

To view the AOA House of Delegates meeting virtually through a live stream, please complete the registration information below.  
**Important Note:** this option provides the ability for interested members to **only view** the deliberations of the House of Delegates.

**2022 HOD Virtual Participation Registration Form - Formstack**

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

**Saturday, July 16, 2022**

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
<th>Location</th>
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<tbody>
<tr>
<td>7:30 – 8 am</td>
<td>House of Delegates Meeting (Nominations)</td>
<td>Marriott, Grand Ballroom, 7th Flr</td>
</tr>
<tr>
<td>8 – 10:30 am</td>
<td>House of Delegates Meeting (Reference Committee Reports)</td>
<td>Marriott, Grand Ballroom, 7th Flr</td>
</tr>
<tr>
<td>11 am</td>
<td>AT Still Memorial Lecture and AT Still Bust Presentation</td>
<td>Marriott, Grand Ballroom, 7th Flr</td>
</tr>
<tr>
<td>11:45 am – 12:15 pm</td>
<td>2022 AOA Awards Presentation</td>
<td>Marriott, Grand Ballroom, 7th Flr</td>
</tr>
<tr>
<td>12:15 – 1:30 pm</td>
<td>Lunch on own</td>
<td>Marriott, Grand Ballroom, 7th Flr</td>
</tr>
<tr>
<td>1:30 – 3 pm</td>
<td>House of Delegates Meeting (Reference Committee Reports)</td>
<td>Marriott, Grand Ballroom, 7th Flr</td>
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<tr>
<td>4 – 5 pm</td>
<td>Inaugural Speech of the 2022 / 2023 AOA President</td>
<td>Marriott, Grand Ballroom, 7th Flr</td>
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<tr>
<td>6:30 – 9:30 pm</td>
<td>Presidential Reception</td>
<td>Marriott, Chicago, 5th Flr</td>
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102nd Annual Meeting of the Board of Trustees General Session and House of Delegates Annual Meeting
Chicago Marriott Downtown Magnificent Mile Hotel, 540 N. Michigan Avenue, Chicago, IL 60611

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<tr>
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<td>House of Delegates Meeting (Elections / Reports)</td>
<td>Marriott, Grand Ballroom, 7th Flr</td>
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</table>
# 2022 Annual Business Meeting of the AOA Board of Trustees

**General Session**

**Thursday, July 14, 2022 • 9 am – 3 pm CT**

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

**Zoom Video Conference Link:** Upon Registration

<table>
<thead>
<tr>
<th>Time</th>
<th>Session/Activity</th>
<th>Presenter/Leader</th>
</tr>
</thead>
<tbody>
<tr>
<td>9 am</td>
<td>Call to Order and Welcome</td>
<td>Joseph A. Giaimo, DO, MACOI, President</td>
</tr>
<tr>
<td></td>
<td>Roll Call and Quorum Establishment</td>
<td>Kevin M. Klauer, DO, EJD, CEO</td>
</tr>
<tr>
<td></td>
<td>Osteopathic Pledge of Commitment / AOA Mission and Vision Statement</td>
<td>Joseph A. Giaimo, DO, MACOI, President</td>
</tr>
<tr>
<td></td>
<td>Invocation</td>
<td>Robert W. Hostoffer, Jr., DO</td>
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<tr>
<td>9:15 am</td>
<td><strong>Action Items:</strong></td>
<td></td>
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<tr>
<td></td>
<td>Conflict of Interest Disclosures</td>
<td>Joseph A. Giaimo, DO, MACOI, President</td>
</tr>
<tr>
<td></td>
<td>Adoption of Agenda</td>
<td>Joseph A. Giaimo, DO, MACOI, President</td>
</tr>
<tr>
<td>9:20 am</td>
<td><strong>Leadership Reports</strong></td>
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<tr>
<td></td>
<td>President Report</td>
<td>Joseph A. Giaimo, DO, MACOI, President</td>
</tr>
<tr>
<td>9:35 am</td>
<td>President-Elect Report</td>
<td>Ernest R. Gelb, DO, President-Elect</td>
</tr>
<tr>
<td>9:45 am</td>
<td>CEO Report</td>
<td>Kevin M. Klauer, DO, EJD, CEO</td>
</tr>
<tr>
<td>10 am</td>
<td><strong>AOA Operational Updates</strong></td>
<td></td>
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<tr>
<td></td>
<td>Bureaus, Committees and Councils Goals Report</td>
<td>Joseph A. Giaimo, DO, MACOI, President</td>
</tr>
<tr>
<td>10:10 am</td>
<td>Affiliate Relations</td>
<td>Nicole Blankenship, SVP, Affiliate Relations</td>
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<tr>
<td></td>
<td>Governance Leader Perspective</td>
<td>Shannon C. Scott, DO, Chair, Dept. of Affiliate Relations</td>
</tr>
<tr>
<td>10:20 am</td>
<td>Break</td>
<td></td>
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<tr>
<td>10:30 am</td>
<td>Certifying Board Services</td>
<td>Andrea Ciccone, SVP, Certifying Board Services</td>
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<td>Specialty College Communication</td>
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<tr>
<td>10:35 am</td>
<td>Communications and Marketing</td>
<td>Lori M. Wemhoff, SVP, Communications and Marketing</td>
</tr>
<tr>
<td>10:45 am</td>
<td>Graduate Medical Education</td>
<td>Maura Biszewski, VP, Graduate Medical Education</td>
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<tr>
<td></td>
<td>GME Annual Report</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Governance Leader Perspective</td>
<td>Robert W. Hostoffer, DO, Chair, Dept. of Education</td>
</tr>
</tbody>
</table>
10:55 am **Membership**
- Dues Invoice
- Affiliate Resources
- Membership Experiences
- Governance Leader Perspective

Jay Carino, VP, Membership Services
Sonia Rivera-Martinez, DO, Chair, Dept. of Membership

11:10 am **Physician Education and CME**
- Enhanced Services
- Online Enduring
- New Platform

Jeff Fraler, AVP, Physician Education and CME

11:30 am **Public Policy**
- Legislative Priorities
- Governance Leader Perspective

David Pugach, SVP, Public Policy
Richard R. Thacker, DO, Chair, Dept. of Governmental Affairs

11:40 am **OMED 2022 Overview**
- Governance Leader Perspective

Nicole Blankenship, SVP, Affiliate Relations
Jeff Fraler, AVP, Physician Education and CME
Dawn Amaskane, AVP, Administrative Affairs
Peter B. Ajluni, DO, Chair, Council of OMED

12 pm **Lunch**

1 pm **House of Delegates Update**

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

1:05 pm **Organization Reports**
*Organizations are requested to limit their verbal reports to 5-7 minutes.*

Advocates for the American Osteopathic Association (AAOA)
Shane Halvorsen, President, AAOA

American Association of Colleges of Osteopathic Medicine (AACOM)
Robert A. Cain, DO, President and CEO, AACOM

American Osteopathic Foundation (AOF)
Barbara Ross-Lee, DO, President, AOF

American Osteopathic Information Association (AOIA)
Norman Vinn, DO, President, AOIA

Association of Osteopathic State Executives (AOSED)
Diana Ewert, President, AOSED

1:40 pm **Break**

1:50 pm **National Board of Osteopathic Medical Examiners (NBOME)**

John R. Gimpel, DO, President and CEO, NBOME

Osteopathic International Alliance (OIA)
Boyd Buser, DO, Chair, OIA
Student Osteopathic Medical Association (SOMA)  
Courtney Merlo, OMS IV, President, SOMA

Student National Medical Association (SNMA)  
Cherita Moore, OMS III, President, SNMA

Organization Written Reports  
Advocates of the American Osteopathic Association (AAOA)  
American Association of Osteopathic Examiners (AAOE)  
American Osteopathic Foundation (AOF)  
Society of Osteopathic Specialty Executives (SOSE)

2:25 pm  
Break

2:35 pm  
Recognition of Outgoing Advisors and Members of the AOA Board of Trustees  
Joseph A. Giaimo, DO, MACOI, President
  - Ronald R. Burns, DO
    Postdoctoral Trainee Advisor
  - Simran K. Behniwal, DO
    Postdoctoral Trainee Member
  - Vanessa W. Halvorsen, DO
    Postdoctoral Trainee Member
  - Chelsea A. Nickolson, DO
    New Physician in Practice Member
  - Angela Pluguez, DO
    Student Advisor
  - Ryan L. Williamson, OMS IV
    Student Member

2:55 pm  
Closing Remarks  
Joseph A. Giaimo, DO, MACOI, President

3 pm  
Adjournment  
Joseph A. Giaimo, DO, MACOI, President
Advocates for the AOA (AAOA)
Shane Halvorsen, President
The Mission and Purpose of The Advocates for the AOA

Our mission is to support and promote the osteopathic profession. Our Advocate network is vast, ranging from physicians to friends to office staff. We cover the globe, creating a strong, close network of people who understand that osteopathic medicine offers the best type of medical care possible.
Goals for 2022

1. Commitment to our strategic plan to implement remote programs for our mid-stage and student/resident members.

2. Partnerships with AOF/ AOA/ SOMA/ Mental Health.

3. Create new partnerships with COMs and SAA presidents.

4. OMED 2022 Fun Run.

Outcomes

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

SOMA Scholarships and Special Projects

AMERICAN OSTEOPATHIC FOUNDATION

Mental Health and Awareness
Support for our Member Affiliate Groups

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

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

- Discussion of successes and challenges.
- Upcoming events and programs to be supported.
- Create a greater bond among the state and national board, network, and find greater opportunities to work together and support one another.
Student Advocates
Fun Run at OMED 2022 in Boston

- SOMA Scholarships.
- Special Projects Annual Grants.
- SAA Support Across the Country.
- Family Fun Event hosted on Saturday.
- SAA Luncheon.
Appreciation for our AOA support system

• BIG Thanks to Dr. Giaimo, Dr. Gelb, Dr. Klauer, Dr. Garza, and Sarah Farmer.

• We are honored to be affiliated with the AOA and all of the DO family. We are committed to representing and supporting the Osteopathic Profession with integrity and passion to the best of our ability. We will be Advocating with Action this year!
Thank You

Shane Halvorsen
American Association of Colleges of Osteopathic Medicine (AACOM)

Robert A. Cain, DO, President and CEO
Thank You
Robert A. Cain, DO, President and CEO
American Osteopathic Foundation (AOF) Excellence & Expertise
Barbara Ross-Lee, DO, President
Expertise

Dedicated and Diverse Board Members.

Professional Staff.

Dozens of volunteers, serving on ad-hoc committees, task forces or grant and scholarship application review committees.

Hundreds of scholarship, grant and award recipients each year.

Thousands of donors.

Annual Business Meeting of the Board of Trustees • Thursday, July 14, 2022
Excellence

Expanded Engagement Through:


• Project Future – Thought Leader Forums.

• AOF/AAOA - Donna Jones Moritsugu Award Recipient Virtual Co-hort Happy Hour Celebration.

• LGBTQ+ Equity and Inclusion Initiative – CME Training; Engaging Happy Hours and Educational Scholarships.

• Student Osteopathic Medical Association (SOMA) Foundation.
Partnerships

AAOA – Donna Jones Moritsugu Awards & the Holiday Hugs Program

AOAO - ORE-O Research Grant

AOA - New Investigator Grant

COVID-19 Immunization Research Study with Western University of Health Sciences

Scripps National DETECT Study

Specialty Colleges – Outstanding Resident Awards

State Osteopathic Associations – State Emerging Leader Awards
Strong Financials

- Consecutive Giving
- Prudent Investments
- Bequests & Estate Gifts
- New Ways to Give, Connect & Partner

Lasting Impact

- Meeting Donor Goals
- Celebrating Longevity
- Creating Legacies
- Encouraging Innovation
Thank You

Barbara Ross-Lee, DO, President
American Osteopathic Information Association (AOIA)
Norman E. Vinn, DO, President
AOIA Activities

- DC Property
- Managed Services Agreement
- AOIA Membership Structure
- OMED Innovation Track
- Strategic Planning

- Physician Services Payer Advocacy
- Profiles Website Redesign
- AOA Career Center
- AOA Store
- Investments
DC Property
Managed Services Agreement

- Communications
- Finance
- Human Resources
- Legal
- Technology

Net income share under consideration

AOIA Membership Structure

- Now included in AOA dues.
- $10 per member.
- New AOIA Board nominating process 2023.
OMED 2022 Innovation Track

3-hour track

Coordinators:
Cole Zanetti, DO
Sameer Sood, DO

Working with Digital Medicine Society

Pre-recording for on-demand
Strategic Planning

• Full day retreat in DC office.
• Identifying conditions and brainstorming solutions.
• Final plan pending further refinement.
Payer Advocacy

• Anthem
  • Working with Maine on modifier -25 denials.

• Blue Promise
  • Recouping up to $80,000 for practice.
  • Working with California.

• Cigna
  • Proposed mandatory submission of modifier -25 records.
  • Successfully lobbied with other organizations to hold policy.

Contact physicianservices@osteoapthic.org
Profiles Website Redesign

• DOs
  • Streamlined data updates.
  • More efficient licensing board submissions.

• Credentialing customers
  • Simplified ordering.
  • Ease of tracking.

Implementation pending new AOA membership database.
AOA Career Center

- 12,000+ job listings
- Searchable – OMT, PM&R

AOA Virtual Career Fair
May 10, 2022 | 5-8pm ET
AOA Store

- New OMT brochure.
- #DOProud items.
- Billing & coding books.

Visit osteopathic.org/store
Traditional Investments

• 50% Money Market.
• 50% Mutual funds, stocks.

Early-Stage Investments

• DeepLook imaging software.
• Ceras wearable monitoring devices.

Limiting early-stage investments.
Thank You

Norman E. Vinn, DO, President
AOSED Update
Diana M. Ewert, MPA, CAE, President
POMA Chief Staff Officer
Shared Opportunities

• COVID-19 Vaccine Hesitancy Coalition
  • Florida
  • Michigan
  • Ohio
  • Oklahoma
  • Pennsylvania

• National Osteopathic Medicine Week
• AOA Bureaus/Councils/Committees and Task Forces
  • Membership
  • Education
  • Federal Health Programs
  • Osteopathic CME Task Force
• OMED Affiliate Leadership Education
Shared Mission and Sharing Revenue

July 2021 through April 2022

• States received $230,700
• AOSED received $59,064
AOSED 3.1

Supporting our Members

Supporting our States

Supporting the Profession
Thank You

Diana M. Ewert, MPA, CAE, President
National Board of Osteopathic Medical Examiners (NBOME)

John R. Gimpel, DO, President and CEO
Thank You

John R. Gimpel, DO, President and CEO
Osteopathic International Alliance (OIA)

Boyd R. Buser, DO, Board Chair
Board of Directors

2022-2023

• Four osteopathic physicians
• One physician-osteopath
• Four osteopaths
• One osteopathic organization leader

Representation from:
• Brazil
• Denmark
• Finland
• France
• United States
2022 Annual General Meeting and Conference
Helsinki, Finland
June 11-13, 2022

New AOA-appointed board member
Kendi Hensel, DO, PhD, FAAO

2022 Annual General Meeting and Conference
London, United Kingdom
October 19-21, 2023
Membership

73 Member Organizations
• 14 Full Members
• 9 Associate Members
• 50 Partner Members

New Member Organizations
• Finnish Osteopathic Association
• Osteopathic Council of Ireland
• Osteopathic Association of the Kyrgyz Republic
WHO Projects

✓ Survey of the Global Osteopathic Profession
  o Completed in 2020
  o Will be updated in 2025

➢ Global Glossary of Osteopathic Terms
  o 113 identified terms will be included:
    o Drawn from multiple sources, including AOA Glossary of Osteopathic Terminology (maintained by ECOP) and other international glossaries
    o International task force meeting regularly
    o Work is approximately 60% completed

➢ Updating the Benchmarks for Training of Osteopathy
  o Will include osteopathic medicine
Thank You

Boyd R. Buser, DO, Board Chair
Student Osteopathic Medical Association (SOMA)
Courtney Merlo, OMS IV, President
SOMA Updates - Events

• SOMA Spring Convention.
  • In-person for the first time in two years.
  • 160 attendees in Washington DC.

• SOMA Summer Leadership Meeting.
  • Theme is “Support, Learn, Motivate”.
  • 120 SOMA leaders currently in Chicago.
  • Professional and personal development for our members, Chapters, and National Leadership.

• ShaDO Week 2022
  • Week for Pre-SOMA students to visit osteopathic medical students.
  • Virtual campus tours.
Spring Convention Highlights

- Inducted the newest chapter to SOMA.
  - California Health Sciences University College of Osteopathic Medicine.

- Spring House of Delegates.
  - 96 new and experienced delegates.
  - Voted on 25 resolutions.
  - 5 of these resolutions are being brought forward at the AOA HOD.

- DO Day 2022 in Washington DC.
  - Incredible number of student members participated and advocated for the Osteopathic profession.
Projects and Advocacy

• COMLEX Level 1 Survey.
• Amplifying the voice of the Canadian Osteopathic Medical Association in collaboration with the AOA’s BIOM.
• Published an Audition Rotation Guide.
• Hosted the Spring Research Symposium.
• Held a Naloxone Training Session hosted by the Opioid Prevention Task Force.
• Completed several Region-Specific Projects.

• Partnered with COCA, student medical organizations and associations, AOA, AACOM, NBOME, and other partner organizations.
• Formulated and signed a call-to-action letter in collaboration with other student organizations in follow-up to the Supreme Courts decision regarding Roe v. Wade.
• Worked to combat osteopathic discrimination in residency in partnership with AOA, AACOM, AAOE, and NBOME.
• Offered professional and career development opportunities to our members.
SOMA National Leaders 2022-2023
Thank You

Courtney Merlo, OMS IV, President
Student National Medical Association (SNMA)
Cherita Moore, OMS III, President
Thank You
Cherita Moore, OMS III, President
Organization Written Reports
In my role as AAOA President this year, I am working with the incredible AAOA board members to implement our theme of “Advocate with Action” to highlight the importance of advocating for the Osteopathic Profession through each step of the professional journey. The theme supports our continued growth, while still reflecting our rich history. As in past years, we are building upon the AAOA’s history and foundation, while adapting to the ever-changing landscape of a national organization and continuing the progress we have made.

We have several steps to advocate with action this year. We have made a commitment to our strategic plan. We have made changes in all marketing and outreach to reflect the mission of our group by highlighting “advocate”. We are committed to provide resources and programs remotely for our membership, state affiliates and students. We have continued partnership with the AOF and the programs we share. We have been able to help a number of new schools as well as old with their Student Advocate groups. We are committed as an organization to SOMA and special projects, with our annual Fun Run at OMED and are grateful for our sponsors and support each year.

Already this year we have strengthened our relationship with the AOF as we partnered on the Donna Jones Moritsugu Award and the Holiday Hug Award. The Donna Jones Moritsugu Award recognizes the partners of graduating osteopathic medical students who have supported and been involved with their loved one’s career throughout medical school. We recently held a virtual happy hour with 20+ of this year’s winners and got to learn of the incredible impact they have made in the lives of the students they interact with. The Holiday Hug Award gifts two struggling families in School or residency the chance to have a better Holiday. We are so grateful to have a more involved role in this award and are looking forward to our growing partnership through other important initiatives with the AOF.

Another highlight of Advocate work is our involvement with Mental Health Awareness. This year we have contacted additional support groups and have begun strengthening our relationship with NAMI, Medical Minds Matter, and ADAA. We are grateful for the many years of support and guidance we have also received from the Yellow Ribbon. We continue exploring more opportunities to partner with local programs to help support the mental health of our Osteopathic physicians and families.

Another goal this year is to strengthen the relationship with our state affiliates and our SAA/IRAA presidents, by holding the first quarterly meetings of National Council of State Advocate Leaders for the AAOA and National Council of Student and Resident Advocate Leaders for the AAOA. The purpose of these meetings is to create a greater bond among the state and national board, to network and to find greater opportunities to work together and support one another in this challenging environment that the pandemic has created for our membership groups.
The AAOA continues to invest time and energy into the development of our SAA (Student Advocate Association) and IRAA (Intern Resident Advocate Association) chapters around the country. We have begun a national chapter of IRAA because of the difficulty of many significant others and family members of DO’s in residency connecting with one another. We have some very strong SAA groups but it has been challenging for many of them due to nearly all students studying virtually at part of the time. We have added two more SAA’s to our support system and continually look for opportunities to support more schools and student families. We look forward to hosting our in-person SAA event this coming October, and had a great virtual one last year thanks to the AACOFP.

In Boston this coming October, we will also be hosting our annual Fun Run. We have updated our logo and title to ensure understanding of the name A.T. Still Fit For Life Fun Run. We hope that each of you will help support our Fun Run this year. All the money raised goes directly back to SOMA, SAAs, as well as a variety of other organizations supporting osteopathic medicine by way of our Special Projects fund. We will also have the spectacular family fun activity which spouses/children of OMED attendees are invited to attend the day prior.

Our board this year is comprised of many young board members, several student and resident spouses, new physician in practice spouse and two members that are not spouses but rather family members, friends, and colleagues of Osteopathic Physicians. I think this speaks volumes to the commitment and passion our board has for the AAOA, and for Osteopathic advocacy in general, and it will be very exciting to watch this board grow and develop further. We couldn't do it without the amazing support of Dr. Garza our AOA Liaison, Dr. Gelb, Dr. Klauer, our new Executive Director Sarah Farmer and all of you. Thank you for ALWAYS supporting what we DO.

The AAOA has continued to evolve over the past several years. We are grounded in our roots and continue our basic mission: supporting and promoting the Osteopathic Profession and creating a strong, close network of people who are passionate, like us, about osteopathic medicine and advocating with action. We thank the AOA for their continued partnership and opportunities to collaborate and look forward to future collaboration.

Respectfully submitted,
Shane Halvorsen
President, 2021-2022
Advocates for the American Osteopathic Association
The American Association of Osteopathic Examiners (AAOE), which is comprised of osteopathic physicians serving on state osteopathic and composite medical licensing boards (AAOE Fellows), serves as the unified authority in matters affecting osteopathic medical licensure and discipline. Strategically, the AAOE acts as the voice of osteopathic medicine within the Federation of State Medical Boards (FSMB) and collaborates to understand and respond to state regulatory and licensing issues that impact osteopathic medicine.

We currently have representatives on 47 out of the 51 possible regulatory boards (only Alaska, DC, Louisiana and Massachusetts lack osteopathic representation). The AAOE typically meets three times a year, twice in person and once virtually.

Keeping AAOE Fellows Updated on Important Health Policy Trends
The AAOE held its most recent Annual Meeting in-person on April 29th in New Orleans, in conjunction with the FSMB Annual Meeting. During the meeting, we heard from several partner organizations – namely, the FSMB, the National Board of Osteopathic Medical Examiners and the American Osteopathic Association.

The Federation of State Medical Boards shared an update regarding COVID misinformation and disinformation, and legislation that has been introduced that would restrict the authority of US medical boards to investigate patient harm in relation to COVID treatment and provide for the use of medications off-label to treat COVID. The FSMB also updated us on changes to the USMLE licensing exam since 2020, as well as on the reports of several FSMB workgroups dedicated to Emergency Preparedness, Telemedicine, Diversity, Equity and Inclusion in Medical Regulation and Ethics and Professionalism.

We also heard from the NBOME regarding its mission to protect the public by providing the means to assess competencies for osteopathic medicine and related health care professions. The NBOME informed us of changes to the COMLEX-USA exam, and the recommendations of its Special Commission on Osteopathic Medical Licensure, on which I serve, which included recommendations regarding long-term solutions to assess clinical skills competencies for osteopathic medicine, diversity, equity and inclusion, emerging competencies and technological advances in test delivery.

The AOA also shared reports on its federal lobby day and advocacy summit, the new AOA brand campaign and 2022 state legislative activity relevant to the practice of osteopathic medicine. This included information on legislation to expand the scope of practice for various non-physician clinician groups, the expansion of telemedicine and the Interstate Medical Licensure Compact, and other efforts by states to increase license portability as a result of the COVID health care crisis.
The AAOE also launched a quarterly newsletter last August to share updates regarding relevant legislation and regulatory activity with its members, and we recently partnered with the NBOME, the AOA and the American Association of Colleges of Osteopathic Medicine on a letter calling for greater discussion around the distinctive licensure assessment for DOs and MDs. The letter was developed in response to the American Medical Association’s passage of a resolution supporting the development of a single licensure examination for all DOs and MDs, with a separate, osteopathic-specific test for DO students.

Lastly, I recently participated in the Osteopathic International Alliance meeting on June 11 – 13 in Helsinki, Finland on behalf of the AAOE. Meeting topics included the challenges faced by the medical regulatory community during COVID, the osteopathic approach to long COVID, as well as the progress of osteopathy and its regulation internationally.

On behalf of the AAOE, I would like to thank the AOA for its ongoing support for our mission and activities, about which additional information is available on our website: www.aaoe-net.org.

Respectfully submitted,

Alexios Carayannopoulos, DO, MPH
President, AAOE
Colleagues:

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

I am pleased to provide this report to the Board of the American Osteopathic Association.

Overview

For more than 70 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. Even now, that early charter continues its ripple effect as evidenced by the many loan recipients that have gone on to make indelible marks in Osteopathic medicine.

In these seven decades we have advanced from student loans to expanding efforts in support of programs for the profession and acknowledging the contributions of its members.

- We have scholarship and award programs that are celebrating 20+ year milestones such as the AOOF/AOAA Donna Jones Moritsugu Memorial Award, the Sterling G. Welch, DO Scholars Grant, and the William G. Anderson, DO, Minority Scholarship. Behind each one is an individual who wanted to have a lasting impact on our profession through their philanthropy.

- We have donors that have surpassed 30 years of consecutive giving and we are increasingly working with individuals who want to secure their professional legacy by naming the Foundation in their will or estate plan.

- And we continue to benefit from those that have provided Foundation leadership, including most recently - Jeffrey S. Grove, DO, Martin S. Levine, DO, Dixie Tooke-Rawlins, DO, Peter B. Ajluni, DO, and Larry A. Wickless, DO, William T. Betz, DO, and Anthony N. Ottaviani, DO – to name just a few.
Board of Directors and Professional Staff
Our board is an outstanding and diverse group of 20 individuals from across the country. It is comprised of Osteopathic physicians, educators, student leaders, and corporate representatives who believe in and support the Osteopathic profession.

The Foundation recently welcomed a new staff member, Joyce Mallman Law, who assumed the new role of Campaign Director in early April and will help plan and launch our first comprehensive capital campaign to advance the Osteopathic profession.

Financials
The Foundation’s Board of Directors has the fiduciary responsibility for all donations and charitable funds and ensures assets invested are consistent with established policies and objectives. In March, the Foundation completed its annual audit for our fiscal year ending December 31, 2021, which was ruled a “clean audit” by the auditors.

This and other financial information are highlighted in our annual report which was released in early June and is 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 many programs. These donations allow individuals, foundations, corporations, and affiliates to promote the excellence of Osteopathic medicine on a national level.

Grants, Scholarships, and Programs
The Foundation attracts hundreds of grant, scholarship, and award applicants every year. We recently closed our Spring Cycle and I’d be remiss if I didn’t mention the dozens of volunteer reviewers critical to ensuring a successful outcome.

The scale of our giving is matched by a deep sense of responsibility in how we distribute it, making sure those resources are stewarded and deployed as effectively as possible. That means staying focused on what matters—not the money out the door but the impact, which we measure in communities served and opportunities provided for individuals to achieve their full potential.

Strategic Initiatives and Partnerships
We believe that Foundation’s future is about engaging expertise to bridge traditional boundaries and open new paths of excellence and innovation while advancing the mission and purpose that distinguishes the American Osteopathic Foundation.

One such way we are forging this path is through Project Future. The Foundation has been speaking to, and working with, subject matter experts from the profession from across the country over the past year. These experts are providing a broader context on the future of healthcare based on their expertise and experience in the areas of Professional Identity.
Education, Research, and Clinical Practice. Our next step is to convene thought leaders around these four topics, to help cultivate a vision for the profession.

We look forward to sharing the outcomes of this large-scale project during OMED.

As the Foundation reflects on our future, we look to you. You are in a unique position as leaders in the field to share your thoughts and vision. We welcome your ongoing input so that we may strengthen existing partnerships and create new ones that advance the tenants 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 and promotion of its excellence. We look forward to continued collaboration with the American Osteopathic Association.

Respectfully submitted,

Barbara Ross-Lee, DO
President
Thank you for the opportunity to send a written report on behalf of SOSE. We are excited to be able to return in person; SOSE members look forward to being able to see all the smiling faces that have been missed over the last couple of years.

The founding mission and purpose of SOSE are to provide executive education and a support network that addresses the unique challenges of specialty affiliates.

Our activities include providing education for our members, collaborating with fellow specialties, promoting information on the osteopathic profession, mentoring our associates, and serving as a resource for the American Osteopathic Association (AOA) by interacting with AOA on Bureaus, Councils and Committees.

SOSE is honored to have the following leaders continuing to be a part of the AOA conversations. This allows input regarding polices, conferences, and other offerings that affect our organizations. SOSE has the following members taking part on the following AOA Bureaus, Councils and Committees:

**Bureau of Affiliate Relations**
- Carol Houston, AOCR
- Sherri Quarles, AAO
- Karen Caruth, ACOI
- Susan Rees, CAE, AOASM

**Bureau of Osteopathic Education**
- Carol Houston, ACOR

**Bureau on Federal Health Programs**
- Tim McNichols, ACOI

**Bureau of Membership**
- Bob Moore, CAE, ACOFP
Osteopathically Distinct CME Task Force
Sherri Quarles, AAO
Carol Houston, AOCR
Valerie Bakies-Lile, CAE, ACOOG

SOSE is continuing to recruit other Specialty Colleges to be part of our great organization as well as taking part in the AOA. We realize this is a partnership, and partners work to help and promote each other.

SOSE was honored to receive the AOA Organizational Excellence in Advocacy Award in April 2022. We will continue to work hard in that area going forward; we have a lot of strong voices, and we like to keep them active on our issues.

We look forward to the outcome of the challenging work that the Osteopathic Distinctive CME Taskforce has been working on. I am sure there will be a favorable outcome for all.

A big thank you must go out to AOA’s CEO Kevin Klauer, DO, EJD and Nicole G. Blankenship, MBA, CAE, Senior Vice President, Affiliate Relations, who have continued to keep the lines of communication open and have been there with us throughout this entire process.

SOSE understands that our states and specialty associations are vital to our osteopathic family. We realize the importance of each, knowing that our associations have some differences in our business needs and structure, and we also share many commonalities.

Our organizations’ individual needs may differ, but we all want to survive and continue to provide our individually unique value to our members.

The specialty colleges under SOSE welcome collaboration, and hope that the lines of communication remain open, strong, and transparent.

Respectfully Submitted:

Society for Osteopathic Specialty Executives (SOSE) Board

President – Sherri L. Quarles – AAO
Vice President – Carol Houston – AOCR
Immediate Past President – Marsha Wise – AOCD & AOCP
Secretary/Treasurer – Stewart Hinkley – ACOP
Member – Ralph McClish – AOCOO-HNS
Member – Susan Rees, CAE – AOASM