2023 AOA BOARD OF TRUSTEES MIDYEAR GENERAL SESSION
Hotel Del Coronado ∙ Carousel Room

Virtual Participation: Must be registered to obtain Zoom link
*Please remember to place yourself on mute if not speaking*

Wednesday, February 22, 2023 ∙ 9 am – 3 pm PT

<table>
<thead>
<tr>
<th>Time</th>
<th>Agenda Item</th>
<th>Presenter(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>9:00 am</td>
<td>Call to Order and Welcome</td>
<td>Ernest R. Gelb, DO, FACOFP, President</td>
</tr>
<tr>
<td></td>
<td>Roll Call and Quorum Establishment</td>
<td>Val Carr, Chief of Staff</td>
</tr>
<tr>
<td></td>
<td>Osteopathic Pledge of Commitment / AOA Mission and Vision Statement</td>
<td>Ernest R. Gelb, DO, FACOFP, President</td>
</tr>
<tr>
<td></td>
<td>Invocation</td>
<td>William S. Mayo, DO, 122nd AOA President</td>
</tr>
<tr>
<td>9:10 am</td>
<td>Conflict of Interest Disclosures Action</td>
<td>Ernest R. Gelb, DO, FACOFP, President</td>
</tr>
<tr>
<td></td>
<td>Adoption of Agenda Action</td>
<td></td>
</tr>
</tbody>
</table>

**Leadership Reports**

<table>
<thead>
<tr>
<th>Time</th>
<th>Agenda Item</th>
<th>Presenter(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>9:15 am</td>
<td>President’s Report</td>
<td>Ernest R. Gelb, DO, FACOFP, President</td>
</tr>
<tr>
<td>9:35 am</td>
<td>President-Elect’s Report</td>
<td>Ira P. Monka, DO, President-Elect</td>
</tr>
<tr>
<td>9:50 am</td>
<td>Interim CEO’s Report</td>
<td>Kathleen S. Creason, MBA, Interim CEO</td>
</tr>
</tbody>
</table>

**Break**

10:05 am

**Governance and Operations Departmental Reports**

<table>
<thead>
<tr>
<th>Time</th>
<th>Agenda Item</th>
<th>Presenter(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>10:15 am</td>
<td>Department of Affiliate Relations</td>
<td>Frank M. Tursi, DO, Chair</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Nicole Blankenship, MBA, CAE, SVP, Affiliate Relations</td>
</tr>
<tr>
<td>10:30 am</td>
<td>Finance Department</td>
<td>Richard R. Thacker, DO, Chair</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Kim Tran, CFA, CFO</td>
</tr>
<tr>
<td>10:40 am</td>
<td>Department of Education</td>
<td>Robert S. Dolansky, DO, Chair</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Jeff Fraier, AVP, Physician Education &amp; CME</td>
</tr>
<tr>
<td>10:50 am</td>
<td>Department of Governmental Affairs</td>
<td>James M. Lally, DO, Chair</td>
</tr>
<tr>
<td></td>
<td>• Bureau on Federal Health Programs (BFHP) Update</td>
<td>John-Michael Villarama, MA, VP, Public Policy</td>
</tr>
<tr>
<td></td>
<td></td>
<td>George Thomas, DO, Chair, BFHP</td>
</tr>
</tbody>
</table>
2023 AOA BOARD OF TRUSTEES MIDYEAR GENERAL SESSION
Hotel Del Coronado · Carousel Room
Virtual Participation: https://us06web.zoom.us/j/84357772546 | 312-626-6799,,84357772546#
*Please remember to place yourself on mute if not speaking*

Wednesday, February 22, 2023 · 9 am – 3 pm PT

<table>
<thead>
<tr>
<th>Time</th>
<th>Agenda Item</th>
<th>Presenter(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>11:05 am</td>
<td>Membership Department</td>
<td>Julieanne P. Sees, DO, Chair</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Jay Cariño, MBA, CAE, VP, Membership Services</td>
</tr>
<tr>
<td>11:15 am</td>
<td>Department of Research and Public Health</td>
<td>Sonia Rivera-Martinez, DO, Chair</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Sharon McGill, MPH, VP, Research and Public Health</td>
</tr>
<tr>
<td>11:25 am</td>
<td>Break</td>
<td></td>
</tr>
<tr>
<td>11:35 am</td>
<td>DO Day 2023 Update</td>
<td>Sean Neal, VP, Advocacy &amp; Political Affairs</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Nicole Blankenship, MBA, CAE, SVP, Affiliate Relations</td>
</tr>
<tr>
<td>11:45 am</td>
<td>Strategic Partnerships and Health Initiatives Update</td>
<td>Darcy Steinberg-Hastings, MPH, VP, Strategic Partnerships and Health Initiatives</td>
</tr>
<tr>
<td>11:55 am</td>
<td>Communications and Marketing</td>
<td>Lori M. Wemhoff, SVP, Communications and Marketing</td>
</tr>
<tr>
<td></td>
<td>• Brand Campaign Update</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• <em>Journal of Osteopathic Medicine</em> Update</td>
<td>Hunter Alexander, Director, <em>Journal of Osteopathic Medicine</em></td>
</tr>
<tr>
<td>12:15 pm</td>
<td>COCA Update</td>
<td>Genie James, MMSc, VP, Accreditation</td>
</tr>
<tr>
<td></td>
<td></td>
<td>John M. Kauffman, Jr., DO, Chair, Commission on Osteopathic College Accreditation (COCA)</td>
</tr>
<tr>
<td>12:30 pm</td>
<td>Midyear Lunch</td>
<td></td>
</tr>
<tr>
<td>1:30 pm</td>
<td><strong>Organization Reports</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td><em>Organizations are requested to limit their verbal reports to 5-7 minutes.</em></td>
<td></td>
</tr>
<tr>
<td></td>
<td>National Board of Osteopathic Medical Examiners (NBOME)</td>
<td>John R. Gimpel, DO, President and CEO</td>
</tr>
<tr>
<td></td>
<td>Advocates for the American Osteopathic Association (AAOA)</td>
<td>Megan Maples, President-Elect</td>
</tr>
<tr>
<td></td>
<td>American Association of Colleges of Osteopathic Medicine (AACOM)</td>
<td>Robert A. Cain, DO, President and CEO</td>
</tr>
</tbody>
</table>
## 2023 AOA BOARD OF TRUSTEES MIDYEAR GENERAL SESSION
Hotel Del Coronado • Carousel Room

Virtual Participation: [https://us06web.zoom.us/j/84357772546](https://us06web.zoom.us/j/84357772546) | 312-626-6799,,84357772546#

*Please remember to place yourself on mute if not speaking*

**Wednesday, February 22, 2023 • 9 am – 3 pm PT**

<table>
<thead>
<tr>
<th>Time</th>
<th>Agenda Item</th>
<th>Presenter(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>American Association of Osteopathic Examiners (AAOE)</strong></td>
<td>Alexios Carayannopoulos, DO, President</td>
</tr>
<tr>
<td></td>
<td><strong>American Osteopathic Foundation (AOF)</strong></td>
<td>Dawn Tartaglione, DO, FACOS, DFACOS, President</td>
</tr>
<tr>
<td></td>
<td><strong>American Osteopathic Information Association (AOIA)</strong></td>
<td>Norman E. Vinn, DO, MBA, Chair</td>
</tr>
<tr>
<td></td>
<td><strong>Association of Osteopathic State Executive Directors (AOSED)</strong></td>
<td>Diana M. Ewert, MPA, CAE, President</td>
</tr>
<tr>
<td></td>
<td><strong>Bureau of Emerging Leaders (BEL)</strong></td>
<td>Selena G.M. Raines, DO, Chair</td>
</tr>
<tr>
<td></td>
<td><strong>Break</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Council of Osteopathic Student Government Presidents (COSGP)</strong></td>
<td>Anthony Sciuva, OMS III, National Chair</td>
</tr>
<tr>
<td></td>
<td><strong>Osteopathic International Alliance (OIA)</strong></td>
<td>Boyd R. Buser, DO, Chair</td>
</tr>
<tr>
<td></td>
<td><strong>Society of Osteopathic Specialty Executives (SOSE)</strong></td>
<td>Carol Houston, President</td>
</tr>
<tr>
<td></td>
<td><strong>Student Osteopathic Medical Association (SOMA)</strong></td>
<td>Courtney Merlo, OMS IV, National President</td>
</tr>
<tr>
<td>2:45</td>
<td><strong>Closing Remarks</strong></td>
<td>Ernest R. Gelb, DO, FACOFP, President</td>
</tr>
<tr>
<td>3 pm</td>
<td><strong>Adjournment</strong></td>
<td>Ernest R. Gelb, DO, FACOFP, President</td>
</tr>
</tbody>
</table>

*Organizations providing written reports.*
American Osteopathic Foundation (AOF)
Student National Medical Association (SNMA)
Welcome!
Board of Trustees
Midyear Meeting
General Session

Wednesday, February 22, 2023 | Hotel del Coronado
9 am – 3 pm PT
Carousel Room | https://us06web.zoom.us/j/84357772546
Call to Order and Welcome
Ernest R. Gelb, DO, FACOFP, President
Roll Call and Quorum Establishment

Val Carr, Chief of Staff
Welcome Organizational Leaders

Ernest R. Gelb, DO, FACOFP, President
Osteopathic Pledge of Commitment

I pledge to:

Provide compassionate, quality care to my patients;
Partner with them to promote health;

Display integrity and professionalism throughout my career;
Advance the philosophy, practice and science of osteopathic medicine;
Continue life-long learning;

Support my profession with loyalty in action, word and deed; and
Live each day as an example of what an osteopathic physician should be.
Mission and Vision Statements

Mission
The AOA is the professional home for osteopathic physicians and students, providing education, board certification and is the champion of the advancement of the distinctive osteopathic profession.

Vision
The AOA aspires to be the “North Star” of the osteopathic profession by advancing the interests of osteopathic physicians and students and promoting excellence in patient care consistent with the distinctive osteopathic philosophy.
Invocation

William S. Mayo, DO, 122nd AOA President
Action Items

• Conflict of Interest Disclosures
• Adoption of Agenda
President’s Report
Ernest R. Gelb, DO, FACOFP, President
Thank You

Ernest R. Gelb, DO, FACOFP, President
President-Elect’s Report

Ira P. Monka, DO, President-Elect
Thank You

Ira P. Monka, DO, President-Elect
Interim CEO’s Report

Kathleen S. Creason, MBA, Interim CEO
Thank You

Kathleen S. Creason, MBA, Interim CEO
BREAK
Governance and Operations Departmental Reports
Department of Affiliate Relations

Frank M. Tursi, DO, Chair, Dept. of Affiliate Relations
Nicole Blankenship, MBA, CAE, SVP, Affiliate Relations
AOA Affiliate Relations Staff Team

Nicole Blankenship, MBA, CAE  
Senior Vice President, Affiliate Relations  
nblankenship@osteopathic.org | ext. 8079

Hope Hurley  
Director, Affiliate Relations  
hhurley@osteopathic.org | ext. 8076

Jenny Hull  
Senior Administrative Manager  
jhull@osteopathic.org | ext. 8049

Valerie Bakies Lile, CAE  
Director, Student Initiatives  
vilile@osteopathic.org | ext. 8056

Josie Scumaci  
Senior Manager, Affiliate Finance  
jscumaci@osteopathic.org | ext. 8077
Bureau of Affiliate Relations (BAR)

Description:
- Direct Link to AOA BOT
- Input into Policy Development
- Forum for Information Exchange
- Advise AOA on Critical Issues
- Collaborate on Leader Education
- Award Recognition Programs

Goals/Objectives:
- Foster Collegial Environment
- Communicate Perspectives to BOT
- Develop Affiliate Leader Education
- Make Recommendations to Committee on Awards for Bob E. Jones, CAE and Outstanding Affiliate Awards
BAR Outcomes and Accomplishments

- Held meeting Nov. 2022 and scheduled for Feb. and May 2023
- Collaboration on Affiliate Leader Meeting in May 2023
- Discussed increasing engagement on town halls/quarterly calls
- Shared feedback on Midyear, DO Day, and OMED
Oversight of Bob E. Jones, CAE Award

Congratulations!
2022 Bob E. Jones, CAE Award Recipient

Suzanne Frederick, MSN
ED, Idaho Osteopathic Physicians Association
& Kentucky Osteopathic Medical Association
Oversight of Outstanding Affiliate Awards

Congratulations!

2022 Outstanding Affiliate Award Recipients

Arizona Osteopathic Medical Association
Operational Update – Department of Affiliate Relations

Assure meaningful, collaborative partnerships and bidirectional communication.

- Resources available on Affiliate Workspace
- Management services provided for SOMA
- Day-to-day liaison between AOA and affiliate leaders
- Valuable tips, tools, and templates upon request
- Clearinghouse for AOA information
- Weekly *Affiliate News* containing important AOA information for affiliate leaders.
| Establish | Establish a list of service improvement action items from the affiliate satisfaction survey and implement each. |
| Further   | Further develop and implement the Affiliate Leader Educational Track and explore collaboration with AOSED. |
| Explore   | Explore student recruitment, retention and engagement opportunities with AOA affiliated organizations. |
| Market    | Market and enhance partnerships with affiliated organizations for the use of the AOA LMS and “Notified”. |
Service Improvements Identified in Affiliate Satisfaction Survey

Increase OMP Report and Marketing Toolkit Promotion to Address 48% Unawareness.

- Promoted in August 3 issue of "Affiliate News"
- Encouraged affiliates to share data with their members
- Sent personal email to affiliate EDs/CEOs on August 15
- Also promoted in September 21 issue of "Affiliate News"
Affiliate Leader Meeting - Overview

- May 2-3 at AOA Headquarters in Chicago
- Announced during January Quarterly Affiliate Call
- State and specialty affiliate executive directors/CEOs
- Replaces postponed Affiliate Leader Track from OMED22
- Overall purpose is to gather affiliate leaders to learn, engage, interact, collaborate and share best practices
- Content recorded and made available following meeting
Affiliate Leader Meeting – Goals and Objectives

- AOA overview and introduction to departments
- Networking opportunity with AOA leadership, staff and each other
- Association management educational content
- Sharing of best practices and successes among affiliates
- Breakout sessions tailored for varying levels of ED experience
- AOSED and SOSE meetings (optional)
- Opportunity for 1:1 meetings with AOA staff
**Student Recruitment, Retention and Engagement**

- SOMA News column in *Affiliate News*

- OMS-specific quarterly communications sent for joint AOA/SOMA membership campaign

- Mentor Café at OMED22 with 12 specialty organizations

- SOMA alumni reception and student membership recruitment event at OMED22

- Written and video testimonials obtained from SOMA national leaders for future promotion
Thank You

Frank M. Tursi, DO, Chair, Dept. of Affiliate Relations
Nicole Blankenship, MBA, CAE, SVP, Affiliate Relations
Finance Department

Richard R. Thacker, DO, Chair, Finance Department
Kim Tran, CFA, Chief Financial Officer
• Personnel Recap
  • New Assistant Controller – Steve Bielat, CPA
  • New Senior Staff Accountant – Blanca Rodriguez-McKenzie

• Strategic Activities
  • Implementing new state of the art cloud-based accounting system - Sage Intacct with a planned go-live in April 2023
  • Signed up with new auditing firm – Marcum, LLP
  • Work on determining mission-related and unrelated activities for the AOA and resulting potential financial and tax impact on the organization
  • Monthly meetings between President, President-elect and CFO and special guests
  • Financial reports and updates to the BOT. Attendance and feedback are much appreciated and adds to a culture of financial awareness and transparency. THANK YOU!
Finance Department (continued)

• Operations
  • Delivered a balanced FY23 budget of $30 million in revenues
  • Staffed reserve policy working group
  • Develop new processes and procedures for more efficient and better controls around payables and receivables
  • Worked with investment advisor (Taiber Kosmala and Associates, LLC) to minimize impact of market volatility on investment portfolio
  • Worked with leasing agent to pinpoint new market opportunities for 142 E Ontario, specifically in the medical office leasing space based on proximity to large hospitals
Thank You

Richard R. Thacker, DO, Chair, Finance Department
Kim Tran, CFA, Chief Financial Officer
Thank You

Robert S. Dolansky, DO, Chair, Dept. of Education
Jeff Fraler, AVP, Physician Education & CME
Department of Government Affairs

James M. Lally, DO, Chair, Department of Government Affairs
George Thomas, DO, Chair, Bureau on Federal Health Programs
John-Michael Villarama, MA, VP, Public Policy
Bureau on Federal Health Programs
FY23 Goals/Objectives

- 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, CERA and CSHA.
- Support the Training in Policy Studies Program.
- 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.

The BFHP met on January 25th to discuss 2018 sunset policies, and the legislative landscape of the 118th Congress. Providing insight were speakers from the U.S. House Committee on Energy and Commerce, Way and Means, and the U.S. Senate Committee on Finance. We were also joined by the NIH to discuss opportunities with the Advance Research Projects Agency for Health (ARPA-H).
Council on Economic and Regulatory Affairs  
FY23 Goals/Objectives

- 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 on Economic and Regulatory Affairs will meet on February 27th to discuss several proposed rules from CMS, the regulatory landscape for 2023, and review 2018 sunset policies.
Council on State Health Affairs
FY23 Goals/Objectives

• Provide guidance 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 on State Health Affairs met on February 20th to discuss 2023 state activity and review 2018 sunset policies, including two white papers.
2022 State Advocacy Accomplishments

• Sent 21 letters in partnership with state and specialty affiliates to successfully:
  • Defeat non-physician clinician scope expansion attempts in 6 states: Illinois, Mississippi, Tennessee, Virginia, Washington and Wisconsin
  • Enact Interstate Medical Licensure Compact legislations in Indiana and Maryland
  • Amend two regulations in Oklahoma and New Jersey to reflect DO equivalency
  • Enact legislation to create a bone marrow donor registry in Indiana
  • Defeat a foreign physician licensure legislation in Arizona
2022 Federal Advocacy Accomplishment

- Sent 51 letters to Congress, 12 of which were in partnership with state and specialty affiliates to successfully:
  - Mitigate Medicare physician payment cuts originally slated to take effect January of 2023 by 6.5%
  - Extend for one year the Advance Alternative Payment Models (APM) bonus payment at 3.5%
  - Extend telehealth services that are available due to the COVID-19 Public Health Emergency (PHE) through 2024
  - Fund 200 additional Medicare-funded graduate medical education residency positions
  - Require states to provide newborns with 12 months of continuous healthcare coverage under Medicaid and the option to provide 12 months of continuous postpartum coverage when the PHE ends
  - Eliminate the requirement for an X-Waiver for health care practitioners to dispense buprenorphine for detoxification treatment
  - Provide funding to states to implement federal mental health parity requirements
  - Fund gun violence prevention research at NIH and CDC at $25 million for FY23
2022 Advocacy Summary

Key Metrics: Grassroots

23
number of grassroots campaigns.

2,842
number of AOA Advocates who engaged in an advocacy campaign.

6,732
number of communications sent to lawmakers.

Tell Your Lawmakers to Prevent Devastating Medicare Cuts!

Call-to-Action: Congress must act now to prevent additional cuts to Medicare.

Unfortunately, a 2% sequestration cut has already gone into effect. In addition to this cut, a 3.75% budget neutrality cut as well as an additional 4% PAYGO cut will be enacted if Congress does not waive PAYGO requirements later this year. Combined, all three cuts would be a 9.75% cut to Medicare payments starting on January 1st, 2023.

Please act now by using the AOA Action Center to email your lawmakers today, and urge them to avert these debilitating cuts in Medicare payment!
Osteopathic Advocacy Network (OAN)

- Establish and build relationships with lawmakers and staff
- Additional opportunities to engage during Congressional recess periods
- Monthly public policy roundtables, hosted on the first Wednesday of each month at 4:00 pm ET
- Allows members to engage with AOA staff to help tailor and advance our advocacy efforts
2023 State Activity

• In 2023, all 50 states will hold regular sessions, including Montana, Nevada, North Dakota, and Texas, which only meet in odd-numbered years

• Forty-five states are currently convened

• Trends:
  • Scope of practice creep, especially for PAs and nurses
  • New licensure pathways for Foreign Medical Graduates
    • Active in AZ, TN
  • “Associate Physician” licensure for unmatched DOs/MDs
    • Active in IN, HI, VA; MO considering expansion
  • Prescription drug misuse, abuse and diversion
  • Interstate Medical Licensure Compact
    • Active in NM, NY, MA, MO, VA

2023 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 osteopaths are recognized as equivalent to their allopathic counterparts. Educate legislators about curricular 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 truthfully communicate their degrees and licensure to patients, and require entities offering physician board certification to disclose 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 infrastructure and workforce, reduce health care disparities and establish a robust national strategy to combat future public health emergencies.

PHYSICIAN WORKFORCE
Support enactment of legislation that increases the physician workforce by increasing funding for graduate medical education and expanding financial incentives to facilitate physicians’ ability to care for patients in rural and underserved communities.

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

ACCESS AND AFFORDABILITY
Support legislation that enhances access to timely, affordable, high-quality care for all patients. This includes:
• Supporting network adequacy and transparency requirements for insurers.
• Supporting legislation to stabilize state health insurance exchanges and expand Medicaid.
• Supporting access to affordable prescription drugs, including by regulating Pharmacy Benefit Managers.
• Supporting enactment of legislation that alleviates arbitrary burdens in step therapy and prior authorization.
• Opposing any legislation that would interfere with the patient-physician relationship and physicians’ ability to provide evidence-based information and treat their patients.

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

Board of Trustees Midyear General Session • Wednesday, February 22, 2023
In the 118th Congress public policy will continue to advocate for:

- Comprehensive Medicare payment reform that accounts for the true cost of practicing medicine
- Protecting the physician-led team-based approach of providing care to patients
- Preserving the physician patient relationship in healthcare decision making
- Access to care in underserved rural and urban communities
- Funding for graduate medical education
- Relief from student loans, and unnecessary burden on physician practices
Regulatory Focus for the Administration in 2023

In instances where Congress may be gridlocked, the Biden Administration may leverage rulemaking to advance priorities. Areas of focus for rulemaking in the coming year that will impact physicians are likely to include:

- Physician burden reduction and prior authorization
- Promoting interoperability to improve the exchange of patient data and support care coordination
- Addressing drug pricing and driving value-based care via CMMI models
- Continuing to implement provisions of the Inflation Reduction Act
- Insurance coverage reform and strengthening of beneficiary protections

In addition to these issues, the public policy team will continue to advocate for improved Medicare payment via regulatory and legislative vehicles.
AOA has already collaborated with other specialties on 2 coalition letters related to the below rules in addition to its own comments.

### CY24 Medicare Advantage and Part D Rule

- Would require MA plans to comply with traditional Medicare coverage policies and prohibit use of proprietary sources for developing coverage criteria or making medical necessity determinations.

- Would implement continuity of care requirements to ensure continued coverage of services when beneficiaries change MA plans.

- Would require plans to establish Utilization Management Committees to review UM policies and require coverage denials to be reviewed by an individual with expertise relevant to the treatment.

### Improving Prior Authorization and Interoperability Rule

- Would establish PA requirements similar to those in the Improving Seniors’ Timely Access to Care Act which across a broad range of plan types:
  - Require electronic prior authorization
  - Limit decision timeframes
  - Require denial reasons
  - Require public reporting of PA metrics

- Would promote interoperability by establishing new application programming interfaces, most notably, a payer-to-provider API that supports physician access to patient data at the point of care.
Thank You

James M. Lally, DO, Chair, Department of Government Affairs
George Thomas, DO, Chair, Bureau on Federal Health Programs
John-Michael Villarama, MA, VP, Public Policy
Membership Department

Julieanne P. Sees, DO, Chair, Dept. of Membership
Jay Cariño, MBA, CAE, VP, Membership Services
Department of Membership

• Bureau of Membership
• Bureau of Emerging Leaders
• Bureau of International Osteopathic Medicine

Bureau of Membership FY23 Goals/Objectives

• 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.
The Bureau of International Osteopathic Medicine (BIOM) is comprised of:
- Chair Kevin de Regnier, DO
- 13 Bureau members
- 1 Advisor position
- Secretary Raine Richards, JD, VP of State and International Affairs

The goal of the BIOM is to support the advancement and acceptance of osteopathic medicine internationally.

Current activities include outreach to the Federation of Medical Regulatory Authorities of Canada (FMRAC) and Canadian provincial authorities in conjunction with the Canadian Osteopathic Association, to facilitate greater recognition of US DO credentials across Canada.
- As of January 30, 2023, we are awaiting a response from FMRAC regarding a possible meeting to discuss these efforts.
• The Bureau collaborated with the American College of Osteopathic Family Physicians during OMED 2022.

• **Joseph Johnson, DO**, Dean of Liberty University College of Osteopathic Medicine and **Ted Findlay, DO**, BIOM International Affiliate presented on Project ECHO.

• Project ECHO is a knowledge-sharing model that allows a single specialist to contribute to the development of 20 or more local experts, who then go on to apply their newly acquired knowledge to improve the lives of people in their communities.

• More information: [https://hsc.unm.edu/echo/](https://hsc.unm.edu/echo/)
The BIOM partners with SOMA and DOCARE to **sponsor an annual abstract competition to encourage global initiatives among medical students.**

Participants competed in two categories (Research & Narrative Medicine) and presented on their projects at OMED22.

More information: [https://osteopathic.org/about/aoa-events/2022-biom-international-seminar/](https://osteopathic.org/about/aoa-events/2022-biom-international-seminar/)

<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Winners: Research</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Winners: Narrative Medicine</strong></td>
<td></td>
</tr>
</tbody>
</table>
BIOM QUESTIONS?

Kevin de Regnier, DO, BIOM Chair
kderegnierdo@osteopathic.org

Raine Richards, JD, BIOM Secretary
rrichards@osteopathic.org
Bureau of Membership Operational Updates

• Further develop the resources and community experience within the AOA mobile application
• Enhance enrollment in the AOA mobile application
• Finalize the migration to and implementation of Fonteva
• Continue the marketing plan to target osteopathic medical students for membership recruitment (continue collaboration with SOMA)
• Retrain member resource center staff to enhance the member experience
• Explore development of an engagement tool to drive member engagement
Thank You

Julieanne P. Sees, DO, Chair, Dept. of Membership
Jay Cariño, MBA, CAE, VP, Membership Services
Department of Research and Public Health

Sonia Rivera-Martinez, DO, Chair, Dept. Research and Public Health
Sharon L. McGill, MPH, VP, Research and Public Health
Bureau of Osteopathic Research and Public Health
Description

• Directs all AOA research and public health activities
• Manages all research grant and fellowship programs
• Develops public health initiatives and educational programs
• Advises AOA on public health and research policy
Highlights of BORPH Research Activities

2022 OMED Virtual Poster Hall

• 2022 Research Poster Session and Student Competition (Virtual)
  • Call for Research Abstracts each Spring
  • Categories include Basic Science, Clinical, Health Services, and a new category on Public Health research
  • 127 registrants attended the poster session
  • 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
  • Of the 94 approved abstracts, 85 were from students who entered the student poster competition
Highlights of BORPH Research Activities

2022 OMED Virtual Poster Hall

• 23 judges in teams of two evaluated student presenters at assigned times
  • Three students awarded first place prizes
  • Six students awarded second place prizes
• 2 AOA Category 2B credits are approved to view posters through September 2023
• Link to Poster Gallery: https://osteopathic.org/life-career/osteopathic-research/aoa-research-track/omed-2022-posters/
Highlights of BORPH Public Health Activities

2022-2023 Public Health Initiatives

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

Topics include:

• Cancer detection and screening including genetic screening
• 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
Highlights of BORPH Public Health Activities

2022-2023 Public Health Initiatives

• 4 BORPH workgroups were formed to address each topic and met in January
• SOMA representatives are participating on the healthy nutrition/food insecurity workgroup
• Deliverables:
  • For Physicians: Key talking points on the issues to address
  • For Patients: One 2-page informational sheets for physicians to use when talking to patients and as handouts for patients. The handouts will be written for patients with health literacy in mind
**Highlights of BORPH Public Health Activities**

**Additional Public Health Initiatives for 2022-2023**

- Immunization promotion and addressing vaccine hesitancy
  - AOA has received grant funding around this issue

- Addressing social determinants of health and health disparities with patients
  - Promoting the AOA SDOH Physician Toolkit developed last year
  - Addressing SDOH within the other public health activities such as food insecurity, mental health and immunizations
Thank You

Sonia Rivera-Martinez, DO, Chair, Dept. Research and Public Health
Sharon L. McGill, MPH, VP, Research and Public Health
BREAK
DO Day 2023
Update

Sean Neal, VP, Advocacy & Political Affairs
Nicole Blankenship, MBA, CAE, SVP, Affiliate Relations
DO Day 2023 – In Conjunction with NOM Week!

DO Day

Distinctive in Healthcare Advocacy and Leadership
DO Day Project Charter - Overview, Goals and Benefits

Overview
• Premier osteopathic advocacy event of the year
• Virtual CME sessions for physicians, students, and affiliate leaders
• Aims to educate lawmakers about the issues osteopathic physicians and students face

Goals and Objectives
• Increase physician and affiliate participation
• Advocate for health policy that impacts the osteopathic profession
• Provide advocacy leadership education for physicians, students, and affiliates leaders

Benefits
• Osteopathic community engagement
• Advancement of the profession through advocacy for health policy/regulatory changes
• Dually accredited CME
Key Program Highlights

- Keynote speakers:
  - Charlie Cook (political analyst)
- Virtual healthcare advocacy and policy conference offering CME
  - Physician track
  - Student track
  - Affiliate leader track
- In-person briefings
- In-person congressional visits
- AOA advocacy awards
- Community-wide osteopathic event
- In conjunction with NOM Week
Schedule Overview

Saturday, April 15 – Virtual
- Keynote Speaker: TBD
- Live Q&A with Keynote Speaker
- Virtual Exhibit Hall
- Specialized Learning Tracks (CME)
- Social Media Advocacy Training

Wednesday, April 19 – In-person
- Exhibits
- Congressional Meeting Preparation
- Advocacy Awards
- Government Speaker
- OPAC Reception

Sunday, April 16 - Virtual
- Keynote Speaker: Charlie Cook
- Live Q&A with Keynote Speaker
- Virtual Exhibit Hall
- Specialized Learning Tracks (CME)
- Legislative Issue Overview

Thursday, April 20 – In-person
- Hill Visits
- Group Photo
- Congressional Meetings
- DC Office Open House
Programmatic Construct

- Registration Fees:
  - Members - $259
  - Non-members - $599
  - Residents and Students - $35*
  - Affiliate EDs/CEOs - $125*

- Choice of Participation:
  - Virtual conference
  - Virtual conference and in-person congressional meetings

- Virtual content with 10-15 hours of dually accredited CME

- Opportunity for online enduring content post-conference

- In-person congressional meetings and prep sessions

*Pricing for in-person congressional meetings. Complimentary for virtual education only.
Thank You

Sean Neal, VP, Advocacy & Political Affairs
Nicole Blankenship, MBA, CAE, SVP, Affiliate Relations
Strategic Partnerships and Health Initiatives

Darcy Steinberg-Hastings, MPH, VP, Strategic Partnerships and Health Initiatives
Promote and Implement AOA Health Initiatives
COVID-19 Treatment

- Literature Review of Existing Treatments and Efficacy for Mild-Moderate COVID-19
- OMED22 Symposium: “Up-to-Date Insights on COVID-19 Treatment”
- Enduring CME Program
- Educational Webinar
- Webpages and Online Education
- Physician and Patient Educational Resources
Promote and Implement AOA Health Initiatives
Influenza Prevention

• Osteopathic Physician Expert Videos

• OMED22 Session: “Combatting Health Misinformation and Disinformation: Effective Use of Social Media”

• Social Media Toolkit

• Patient Resources

• Social Media Messages
Promote and Implement AOA Health Initiatives

RSV Prevention

- Osteopathic Physician Expert Videos
- RSV Awareness and Patient Education Resources
- CME Webinar for Physicians and Their Teams
- Social Media Messages
Continuing Medical Education Grant Funded Programs

- **Addressing the Impact of COVID-19 and Health Disparities in Osteopathic Medicine – Managing Type II Diabetes**
  Learners - 1,524

- **The Present and the Future of HPV Cancer Prevention: A Roadmap for Clinicians**
  Learners - 1,663

- **Addressing the Impact of COVID-19 and Health Disparities in Osteopathic Medicine – Managing Heart Failure**
  Learners - 1,515

- **Addressing Pneumococcal Immunization Needs in Adults: Practical Approaches**
  Learners – 1,046

- **Pneumococcal Immunizations in Adults: Integrating New Recommendations into Practice**
  Learners - 900
  (Currently Live)
Internal Partnerships to Promote Health Initiatives and Public Health

Bureau of Osteopathic Research and Public Health
  • Living Well and Aging Well Series
    • Social Determinants of Health
    • Mental Health
    • Physical Activity
    • Cancer Prevention
    • Nutrition on a Budget

Affiliate Relations
  • Affiliate News
  • Affiliate Partnerships

Marketing and Communications

Public Policy
Lead Efforts in Obtaining Funding for AOA Initiatives and Sponsorship

OMED22 and DO Day Sponsorship
- 25 Sponsors
- 3 Symposia

Seeking Additional Funding Opportunities
- Robert Wood Johnson Foundation
- JPB Foundation
- The Hilton Foundation
- Bezos Family Foundation
- Johnson & Johnson
- Bill and Melinda Gates Foundation
- The Susan Thompson Buffet Foundation
- W.K. Kellog Foundation
- The David and Lucile Packard Foundation
- The Rotary Foundation
- Health Resources and Services Administration
- National Institutes of Health
American Osteopathic Association Patient Safety Organization
Contracts and Education

• Bonafide Contracts:

  • Identified 2 Physician Practices; One Subspeciality and One Primary Care

  • Will Execute Contract Following Legal Review of Policies and the Provider-PSO Agreement

  • Finalizing Training Materials for Internal Workforce and PSO Members
Patient Safety Evaluation System and Website Development

- **Patient Safety Evaluation System**
  - Created Internal and External Policy to Guide Exchange and Creation of Patient Safety Work Product
  - Developing Webpage with PSO Resources and Secure Event Reporting Portal
Contracts and Education and Training

• PSO Policies
  • Policies in Final Stage of Review Pending Completion of PSES Process
  • Onboarding AOA Leadership Prior to Program Rollout

• Expert Advisors
  • Moving Forward with External PSO Experts for Added Expertise and Strategic Planning
  • Developing Guidance to Define Roles and Responsibilities
Partnerships and Promoting Osteopathic Philosophy

Tenets of Osteopathic Medicine:

- The body is a unit; the person is a unit of body, mind, and spirit
- The body is capable of self-regulation, self-healing, and health maintenance
- Structure and function are reciprocally interrelated
- Rational treatment is based upon an understanding of the basic principles of body unity, self-regulation, and the interrelationship of structure and function
Thank You

Darcy Steinberg-Hastings, MPH, VP, Strategic Partnerships and Health Initiatives
Communications and Marketing

Lori M. Wemhoff, SVP, Communications and Marketing
Brand Campaign Update

Lori M. Wemhoff, SVP, Communications and Marketing
CONSUMER

• 58.5 million total impressions
  • +30% over impression goal

• Overall campaign engagement strong with a 0.19% CTR
  • +90% above the category benchmark
  • Campaign engagement was largely driven by native sponsored content, which led to 87% of clicks

• Find a DO conversions increased for 2022
  • 14% lift in website sessions
  • 7% lift in Find a DO conversions
Internal…Display and Online Video

Online video completion rate - 67%
1,361 clicks to the landing page

The display ad units drove 73% (3,635) of the clicks
2.3K new users, indicating that display ads are
Successfully driving repeat visitation with retargeting
Audiences.

KPIs

Awareness (3.3 million impressions)
Engagement (0.27% CTR)
Exceeding campaign goal (0.17%) by 58%
Video Completion (67% VTR)
Internal...SmartBrief Newsletters

Average time on site: 1:21 -- the highest in the internal campaign

Newsletter banners and ads increased our overall visibility
- Family Medicine: Delivered 42% of total impressions
- Pediatrics: Highest combined CTR (0.09%)
- Osteopathic: Delivered 6.5% of total impressions

KPIs
- Awareness (387,000 impressions) – reaching 176% of campaign goal (220,000 impressions)
- Engagement (0.07% CTR) – just below our campaign goal (0.08%)

The remaining added value Osteopathic Newsletter deploy on February 1 and 15
Hearst -- Women Focus

• 4 million impressions
• **100** Find a DO conversions
• Homepage Takeovers – *Prevention & Good Housekeeping*
• 966,000 Superhero ad impressions

**KPIs**

Awareness (**4.12 million impressions**) – goal 3.9 million impressions

Engagement (**0.10% CTR**) – exceeding campaign goal (**0.08%**) by +25%
Well+Good users have an average 1.18 Pages per Session and are spending more than 2.5 minutes on the site.

Display banners provided the highest CTR on the Well+Good site (0.09%).

KPIs
- Awareness (1.74 million impressions) – 100.3% of campaign goal (1.73 million impressions)
- Engagement (0.08% CTR) – meeting campaign goal (0.08%)
The InRead Video Units delivered over 730,000 impressions, and a CTR of 0.18% - just above benchmark.

The Geo-Targeting Display has received over 417,000 impressions and a CTR of 0.05%, right in line with MindBodyGreen’s (MBG) benchmark – in line with benchmarking.

The added value ROS Display Media delivered over 501,000 impressions and a CTR of 0.03% - in line with benchmarking.

**KPIs**

Awareness (3.2 million impressions) – 118% of campaign goal (2.7 million impressions)

Engagement (0.09% CTR) – just under campaign goal (0.10% CTR)
Native Ads - Retargeting

The Reveal ad units led in overall engagement with a 0.50% CTR.

Avg. Time on Site increased to 52 seconds (a 6.1% increase from the mid-campaign report), led by the Responsive ads which drove overall improvements with a time on site of 62 seconds.

Our DMA heavy-ups delivered the strongest engagement exceeding the overall Engagement Score by 0.2 and generating a higher Avg. Time on Site by 5 seconds.

The top performing sites included *The Pioneer Woman*, *The Atlantic*, *Newsweek*, *USA Today*, *HuffPost*, *Yahoo!*, *Newsweek*, and *NBC News*. 
## Content Articles

<table>
<thead>
<tr>
<th>SPONSORED CONTENT</th>
<th>DELIVERED IMPRESSIONS</th>
<th>CLICKS</th>
<th>CTR %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Eczema</td>
<td>6,904,930</td>
<td>19,727</td>
<td>0.29%</td>
</tr>
<tr>
<td>Food Poisoning</td>
<td>6,768,705</td>
<td>21,326</td>
<td>0.32%</td>
</tr>
<tr>
<td>Hydration</td>
<td>11,758,223</td>
<td>45,499</td>
<td>0.39%</td>
</tr>
<tr>
<td></td>
<td>25,431,858</td>
<td>86,552</td>
<td>0.34%</td>
</tr>
<tr>
<td>SMART Goals</td>
<td>1,073,641</td>
<td>4,301</td>
<td>0.40%</td>
</tr>
<tr>
<td>Depression</td>
<td>719,674</td>
<td>3,956</td>
<td>0.55%</td>
</tr>
<tr>
<td>Esports</td>
<td>1,188,379</td>
<td>4,014</td>
<td>0.34%</td>
</tr>
<tr>
<td></td>
<td>2,981,694</td>
<td>12,271</td>
<td>0.41%</td>
</tr>
</tbody>
</table>
Thank You

Lori M. Wemhoff, SVP, Communications and Marketing
Journal of Osteopathic Medicine Update

Hunter Alexander, Director, Journal of Osteopathic Medicine
Efficiencies
• Beginning with the January 2021 issue, JOM has been published online only and open access.
• This allows for quicker publication of each issue as we are no longer concerned with printing and mailing issues.
• 100% of our 2022 and 2023 articles have been published online ahead of issue compilation, compared with 9% and 43% of articles in 2019 and 2020, respectively.
• The majority of 2021 issues (10/12) and all 2022 issues of JOM were published online ahead of schedule.

Social Media Efforts and Updates
• JOM’s dedicated Twitter account –@JOsteoMed – is highly active and is a great resource to stay up-to-date with our latest content and news.
• Our following has nearly doubled to ~4800 over the past 3 years, and continues to steadily increase each month.
• We also work closely with the AOA’s communication and marketing team to produce a new video series in which authors share highlights from their work in the journal. Six videos have been created to date with more to come.

Impact Factor Update
• We are very pleased to report that our journal will receive an Impact Factor for the first time in its 123-year history this summer! This has been the primary goal of JOM’s Editorial staff for many years.
• An Impact Factor is a metric used to evaluate the importance of a journal. It is calculated by dividing a journal’s total number of citations in a certain year by the number of articles published over the previous 2 years.
• Authors and institutions often look at a journal’s Impact Factor when deciding where to submit their work, so receiving an Impact Factor is a landmark achievement for JOM.
Efficiencies Since Going Open Access

• JOM January 2021 issue, published online only and open access

• 100% of our 2022 and 2023 articles have been published online ahead of issue

• Majority of 2021 issues (10/12) and all 2022 issues published online ahead of schedule
Social Media Efforts and Updates

• *JOM’s* dedicated Twitter account – [@JOsteoMed](https://twitter.com/JOsteoMed)

• 4,800 over the past 3 years

• Social Media promotion
Impact Factor Update

• Impact Factor -- first time in JOM’s 123-year history this summer!

• What is an Impact Factor?

• Landmark achievement for JOM
Thank You

Hunter Alexander, Director, *Journal of Osteopathic Medicine*
COCA Update

John M. Kauffman, Jr., DO, FACOI, FACP, Chair COCA
Genie James, MMSc, VP, Accreditation & Interim COCA Secretary
Commission on Osteopathic College Accreditation (COCA)

- As of CY 2022, COCA accredits 38 COMs at 62 sites.
  - 7 Branch Campuses
  - 17 Additional Locations

- COCA accreditation signifies that a college has met or exceeded the Commission’s standards for educational quality.

- COCA is recognized by the U.S. Department of Education as the sole accreditor of colleges of osteopathic medicine (COMs).
  - 2011 - COCA appears before NACIQI and is granted continued recognition for five years (the maximum).
  - 2016 - COCA appears before NACIQI and receives recommendations on 18 criteria with a progress report due.
  - 2018 - COCA submits its progress report and NACIQI finds all deficiencies were corrected. Grants continued recognition for three years.
  - 2021 - COCA appears before NACIQI, receives no recommendations, and is granted renewal of recognition from USDE for five years.
Osteopathic Medical Education is Growing

• 4 COMs in Pre-Accreditation Status
  • California Health Sciences University (CHSU) COM
  • KansasCOM
  • NoordaCOM
  • Sam Houston State University (SHSU) COM

• 3 COMs in Candidate Status
  • Proposed Orlando COM
  • Proposed Duquesne University COM
    • Pending Pre-Accreditation
  • Proposed Baptist Memorial University COM
    • Pending Pre-Accreditation

• 1 Additional Location in Application Process
• 4 COMs in Applicant Status
• 4 Additional Inquiries from Potential COMs
## Anticipated COCA Review Activities April 2023 – May 2024

<table>
<thead>
<tr>
<th>April 2023 – 59 Items</th>
<th>June 2023 / 1 day Meeting</th>
<th>August 2023 – 14 Items</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Comprehensive:</strong> 1</td>
<td><strong>Strategic Planning</strong></td>
<td><strong>Comprehensive:</strong> 2</td>
</tr>
<tr>
<td><strong>Pre-Accreditation:</strong> 2</td>
<td><strong>Outstanding Progress Reports</strong></td>
<td><strong>Pre-Accreditation:</strong> 2</td>
</tr>
<tr>
<td><strong>Pre-Operational:</strong> 2</td>
<td></td>
<td><strong>Pre-Operational:</strong> 1</td>
</tr>
<tr>
<td><strong>Candidate Applications:</strong> 2</td>
<td></td>
<td><strong>Candidate Applications:</strong> 3</td>
</tr>
<tr>
<td><strong>Substantive Change Applications:</strong> 4</td>
<td></td>
<td><strong>Substantive Change:</strong> 2</td>
</tr>
<tr>
<td><strong>Monitoring:</strong> 3</td>
<td></td>
<td><strong>Mid-cycle Reports:</strong> 4</td>
</tr>
<tr>
<td><strong>Annual Reports:</strong> 45</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>December 2023 – 4 Items</th>
<th>April 2024 – 15 Items</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Comprehensive:</strong> 2</td>
<td><strong>Comprehensive:</strong> 3</td>
</tr>
<tr>
<td><strong>Pre-Accreditation:</strong> 2</td>
<td><strong>Pre-Accreditation:</strong> 3</td>
</tr>
</tbody>
</table>

Not including progress reports assigned from previous reviews
Osteopathic Medical Education is Growing

The Future of Our Osteopathic Medical Profession

COM Matriculants 2009-2021

Board of Trustees Midyear General Session · Wednesday, February 22, 2023
Osteopathic Medical Education Continued Growth

Forecasted Growth of U.S. Osteopathic Medical School Matriculants by 2030-2031 & 2035-2036
• 96.5% students and past DO graduates matched into PGY1 residency positions
  • 7% increase over 2021

• 91.3% DO students matched into residency programs spanning 41 specialties
  • The most specialties ever recorded
  • 38 specialties in 2021

• 56.4% matched into primary care programs

• 98.2% placed in GME residencies
COCA Task Force: Ensuring Quality in Medical Education

Task Force Examining How Best to Ensure:

• Students receive an adequate clinical experience, i.e., one not diluted by too many trainees

• GME development keeps pace with the growth in undergraduate osteopathic medical education

• Students have appropriate opportunities to work with medical residents during their clinical rotations

• Current high percentage of residency program placement is maintained
COM GROWTH = Increase in AOA Accreditation Net Revenue

<table>
<thead>
<tr>
<th>Year</th>
<th>Expenses (Millions $)</th>
<th>Net Revenue (Millions $)</th>
<th>Total Revenue (Millions $)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018</td>
<td>$1.8</td>
<td>$0.5</td>
<td>$2.3</td>
</tr>
<tr>
<td>2019</td>
<td>$1.8</td>
<td>$1.2</td>
<td>$3.0</td>
</tr>
<tr>
<td>2020</td>
<td>$1.2</td>
<td>$2.9</td>
<td>$4.1</td>
</tr>
<tr>
<td>2021</td>
<td>$0.8</td>
<td>$2.9</td>
<td>$3.7</td>
</tr>
<tr>
<td>2022</td>
<td>$0.8</td>
<td>$3.0</td>
<td>$3.8</td>
</tr>
</tbody>
</table>
### COCA Fee Schedule 2022: 7% Increase

<table>
<thead>
<tr>
<th>Service Description</th>
<th>Previous</th>
<th>Revised</th>
</tr>
</thead>
<tbody>
<tr>
<td>New COM Application Fee</td>
<td>$100,000</td>
<td>$107,000</td>
</tr>
<tr>
<td>Maintain Application Status/Annual Fee</td>
<td>$75,000/yr</td>
<td>$80,250/yr</td>
</tr>
<tr>
<td>Candidate Status Application Fee</td>
<td>$100,000</td>
<td>$107,000</td>
</tr>
<tr>
<td>Maintain Candidate Status Annual Fee</td>
<td>$50,000</td>
<td>$53,500</td>
</tr>
<tr>
<td>Pre-Accreditation Application Fee</td>
<td>$50,000</td>
<td>$53,500</td>
</tr>
<tr>
<td>Maintain Pre-Accreditation Status Annual Fee</td>
<td>$50,000/yr</td>
<td>$53,500/yr</td>
</tr>
<tr>
<td>Maintain Accreditation Status Annual Fee</td>
<td>$45,000/yr</td>
<td>$48,150/yr</td>
</tr>
<tr>
<td>Additional Assessment w/ Warning</td>
<td>$65,000/yr</td>
<td>$69,550/yr</td>
</tr>
<tr>
<td>Additional Assessment w/ Probation</td>
<td>$65,000/yr</td>
<td>$69,550/yr</td>
</tr>
<tr>
<td>Additional Assessment w/ Heightened Monitoring</td>
<td>$60,000/yr</td>
<td>$64,200/yr</td>
</tr>
<tr>
<td>Resubmission for Re-evaluation of Any Type of Application that is Not Appealed Application Fee</td>
<td>$25,000</td>
<td>$26,750</td>
</tr>
</tbody>
</table>
### COCA Fee Schedule 2022: 7% Increase

<table>
<thead>
<tr>
<th>Sub Change</th>
<th>Previous</th>
<th>Revised</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sub Change: Branch Campus (BC) Part I</td>
<td>$100,000</td>
<td>$107,000</td>
</tr>
<tr>
<td>Sub Change: Branch Campus Part II</td>
<td>$0</td>
<td>$50,000</td>
</tr>
<tr>
<td>Sub Change: Branch Campus Part III</td>
<td>$0</td>
<td>$25,000</td>
</tr>
<tr>
<td>Sub Change: Additional Location (AL) Part I</td>
<td>$100,000</td>
<td>$107,000</td>
</tr>
<tr>
<td>Sub Change: Additional Location Part II</td>
<td>$0</td>
<td>$50,000</td>
</tr>
<tr>
<td>Sub Change: Additional Location Part III</td>
<td>$0</td>
<td>$25,000</td>
</tr>
<tr>
<td>Sub Change: Transition BC/AL to COM</td>
<td>$100,000</td>
<td>$107,000</td>
</tr>
<tr>
<td>Sub Change: Transition BC to AL</td>
<td>$30,000</td>
<td>$100,000</td>
</tr>
<tr>
<td>Sub Change: Transition AL to BC</td>
<td>$30,000</td>
<td>$100,000</td>
</tr>
<tr>
<td>Sub Change: Unplanned Class Size Increase</td>
<td>$125,000</td>
<td>$133,750</td>
</tr>
<tr>
<td>Sub Change: All Other Substantive Change</td>
<td>$30,000</td>
<td>$32,100</td>
</tr>
<tr>
<td>Show Cause Assessment Fee</td>
<td>$125,000</td>
<td>$133,750</td>
</tr>
<tr>
<td>Appeal Filing Fee</td>
<td>$25,000</td>
<td>$26,750</td>
</tr>
</tbody>
</table>
World Federation For Medical Education (WFME)

• August 12, 2022: COCA received Certificate of Recognition Status
• Recognition Status valid until August 31, 2032
• COCA now charged with creating a mechanism and procedure manual for international COM accreditation at WFME
• Increased DO practice rights throughout the world
In Closing: COCA Operations and Commitment to Excellence

• Mission Driven

• Reasonable

• Sustainable
Thank You

John M. Kauffman, Jr., DO, FACOI, FACP, Chair COCA
Genie James, MMSc, VP, Accreditation & Interim COCA Secretary
National Board of Osteopathic Medical Examiners (NBOME)

John R. Gimpel, DO, President and CEO
TODAY’S UPDATES

01. NBOME Mission, Governance
02. COMLEX-USA Updates
03. Core Competency for DO Students
04. Longitudinal Assessment/CATALYST and AOA OCC
05. Advocacy & Research
PROTECTING THE PUBLIC BY PROVIDING THE MEANS TO ASSESS COMPETENCIES FOR OSTEOPATHIC MEDICINE AND RELATED HEALTH CARE PROFESSIONS

NBOME
Who We Are

BOARD OF DIRECTORS 2023
TRANSITION TO PEARSON VUE IN 2023

- Transition began with COMLEX Level 3 in January 2023
- Followed by Level 1 in May 2023, Level 2-CE in June 2023
- Provides a larger network of testing centers, for greater testing availability
- Provides enhanced security measures for test-takers

The NBOME will continue its long and productive relationship with Prometric through the transition, ending in late spring/early summer of 2023.

Learn more at NBOME.org
Candidates are able to access a formative performance profile in addition to their Level 1 pass/fail result.

- Provides info on a candidate’s performance on COMLEX as compared with the national mean performance of first-time Level 1 test takers.
- Provided for the purposes of continuous professional development and lifelong learning for the candidate.

Learn more: nbome.org/blogs
### COMLEX-USA

**WHAT CAN EACH STAKEHOLDER SEE?**

<table>
<thead>
<tr>
<th>Stakeholder</th>
<th>Individual Pass/Fail Results</th>
<th>Individual Formative Performance Profiles</th>
<th>Aggregate School Blueprint Performance</th>
<th>Annual Comparative School Pass Rates</th>
<th>Historical Cohort Pass Rates (on NBOME website)</th>
<th>Annual National Pass Rate (on NBOME website)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Candidates</td>
<td>●</td>
<td>●</td>
<td></td>
<td>●</td>
<td>●</td>
<td>●</td>
</tr>
<tr>
<td>Deans</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
</tr>
<tr>
<td>Program Directors</td>
<td>●</td>
<td></td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
</tr>
<tr>
<td>State Licensing Boards</td>
<td>●</td>
<td></td>
<td></td>
<td>●</td>
<td>●</td>
<td>●</td>
</tr>
<tr>
<td>COCA</td>
<td></td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
</tr>
<tr>
<td>Public</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>●</td>
<td>●</td>
</tr>
</tbody>
</table>

Total numerical scores and discipline subscores are not available for examinations administered after May 10, 2022.
Prototype will assess:

- Patient-physician communication skills
- Hands-on physical exam
- OMT skills

Design:

- Multi-station OSCE model using standardized patients
- Competency-based
- designed for entry into residency program level
- minimizing overall costs to candidates will remain a key consideration
CLINICAL SKILLS ASSESSMENT

NEXT STEPS

COM Pilot partners: RVUCOM, MUCOM, CUSOM, MWU-AZCOM

Training for COMs teams January - April

Pilots Spring 2023 (April – June)
*ACOFP CORTEX implemented in 2019
*NBOME launched WelCOM on CATALYST in 2021
The Association of Departments of Family Medicine, Association of Family Medicine Residency Directors, NAPCRG, and Society of Teachers of Family Medicine issued the following recommendations to promote parity in the residency application process:

1). Family medicine program directors should avoid overreliance on a single examination program when selecting candidates for residency, focusing instead on a holistic review of applicants, regardless of whether they are on the allopathic or osteopathic licensing pathway.
2). Osteopathic applicants to family medicine residency programs should not be required – nor made to feel like they are required – to undergo licensing examinations other than the osteopathic (COMLEX-USA) licensure exam.
3). Residency programs and their sponsoring institutions should implement processes that fairly consider osteopathic applicants within the context of the osteopathic (COMLEX-USA) licensure process.

Read more at NBOME.org.
How the Quadruple Aim Widens the Lens on the Transition to Residency
Barone MA, Bienstock JL, Lovell E, Gimpel JR, Lin GL, Swails F, Mejicano GC.
https://doi.org/10.4300/JGME-D-22-00026.1

UGRC 2021 recommendations on GME transition: pros and cons, opportunities and limitations
https://doi.org/10.1515/jom-2021-0285

Concordance study: COMLEX-USA and USMLE
Barnum S, Craig B, Wang X, Sandella JM, Tsai, TH, Boulet JR, Wang Y.
https://doi.org/10.4300/JGME-D-21-00499.1

Examining concurrent validity between COMLEX-USA Level 2-Cognitive Evaluation and COMLEX-USA Level 2-Performance Evaluation
Craig B, Wang X, Sandella J, Tsai TH, Kuo D, Finch C.
https://doi.org/10.1515/jom-2021-0007
THANK YOU

#DOProud | #NBOME | #COMLEX-USA | #RoadToDOLicensure

JGimpel@nbome.org
Thank You

John R. Gimpel, DO, President and CEO
Advocates for the American Osteopathic Association (AAOA)

Megan Maples, President-Elect
Advocates for the AOA Mission and Purpose

Our mission is to support and promote the osteopathic profession. Our Advocate network is vast, ranging from physicians to family and friends. We cover the globe, creating a strong, close network of people who understand that osteopathic medicine isn't a trend or a passing fad, but the best type of medical care possible.
AAOA and AOF Partnership

- Donna Jones Moritsugu Award
- Holiday Hug Award
Mental Health Awareness
Supporting Member Affiliate Groups

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

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

• Discussion of successes or struggles.
• Upcoming events announcements.
• The purpose of the meetings is to create a greater bond among the state and national boards, network, and find greater opportunities to work together and support one another.
Student Advocates and Intern/Resident Advocates
AAOA OMED Events
Thank You

Megan Maples, President-Elect
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 Association of Osteopathic Examiners (AAOE) Update

Alexios Carayannopoulos, DO, MPH, President
Who We Are

• Comprised of **all osteopathic physicians who serve on state medical licensing boards** ("AAOE Fellows")
  - DOs sit on 47 out of 51 US boards
  - 125 DOs are currently serving

• Unified **authority in matters affecting osteopathic medical licensure** and **discipline**

• Serves as the **voice of osteopathic medicine** within the Federation of State Medical Boards (FSMB)

• Collaborates to **understand** and **respond to state regulatory and licensing issues** that impact osteopathic medicine
AAOE Meetings

• Annual Educational Summit
  • October 29th at OMED
  • AOA, NBOME and FSMB updates
  • SOMA and BEL participated
  • Educational topic:
    • Impact of Dobbs on physician licensure and discipline

• Annual Business Meeting & Elections
  • May 5th at the FSMB Annual Meeting in Minneapolis
  • Open to the public - please join us!
AAOE Internationally

- **International Association of Medical Regulatory Authorities**
  - AAOE will be represented at the 2023 Conference on November 6 – 9, 2023 in Bali

- **Osteopathic International Alliance**
  - AAOE will be represented at the 2023 Annual General Meeting on October 20 – 21 in London

- **AOA Bureau of International Osteopathic Medicine (BIOM)**
  - Barbara E. Walker, DO – BIOM Vice Chair, AAOE Representative
AAOE Representation on Boards & Committees

• **AOA**
  - Council on State Health Affairs: **J. Michael Wieting, DO**
  - Bureau of Osteopathic Education: **J. Michael Wieting, DO**

• **FSMB**
  - Board of Directors:
    - **Jone C. Geimer-Flanders, DO**, FSMB Treasurer
    - **Barbara Walker, DO**
    - **Joseph Willett, DO**
  - Nominating Committee:
    - **Alexios G. Carayannopoulos, DO, MPH**
  - Several AAOE Fellows also serve on key committees/task forces.

• **NBOME**
  - Core Competency Capstone Task Force: **Alexios Carayannopoulos, DO, MPH**
  - AAOE Fellows also participate on Standard-Setting Panels & other NBOME committees.
AAOE Outreach

- AAOE seeks to **increase engagement** with:
  - Osteopathic regulators
  - Students
  - Residents
  - Affiliates and others!

- Our **quarterly newsletter provides updates on medical regulatory trends**, which recently included:
  - Access to Reproductive Health Care
  - California’s Medical Misinformation Law
  - Revised CDC Guideline on Opioid Prescribing
  - January 2023 newsletter had a **60% open rate** – far exceeding “good” open rates of 17 – 28%!¹

- **AAOE would like to extend a special Thank You to the AOA for its ongoing support!**

¹ Per [www.campaignmonitor.com/](http://www.campaignmonitor.com/)
Thank You

Questions?
Alexios Carayannopoulos, DO, MPH, President
acarayannopoulos@lifespan.org

Raine Richards, JD, AAOE Executive Director
rrichards@osteopathic.org

More information: https://www.aaoe-net.org/
The American Osteopathic Foundation’s mission centers on promotion and support of the entire field and it is accomplished through:

• Focus on academic excellence
• Support of innovative research
• Humanitarian outreach both locally and internationally
• Community investment
• Industry honors
Incorporated as The Osteopathic Foundation. Main purpose of financing and managing student loans.

**Foundation celebrates 50 years.** Changes name to the American Osteopathic Foundation.

1960

Name changed to National Osteopathic Foundation. Focus shifts from loans to scholarships.

1999

Minority Scholarship Fund awards first scholarship.

2000

Three recognition awards launched – Educator of the Year, and Physician of the Year and Lifetime Achievement

2002–2007

Board approved forgiving all outstanding student loans. First million-dollar gift received for minority scholarships.

2019

Partnership on the National Scripps DETECT Study begins. Donor database reaches 35,000.

2020

First $1M Gift!

2021

Second $1M Gift!

2022

Fund distribution milestone! Inaugural COVID-19 Hero Awards presented. Inaugural Moritsugu Award recipient virtual gathering w/ AAOA. Project Future Initiative takes shape.

50th Anniversary!

All-time High Fund Distribution!

LGBTQIA+ Health Equity and Inclusion Initiative launched. Second million-dollar gift pledged to support LGBTQ+ Initiative scholarships. SOMA Foundation comes under auspices of AOF.

First $1M Gift!

Second $1M Gift!

50th Anniversary!

All-time High Fund Distribution!

First $1M Gift!

Second $1M Gift!

50th Anniversary!

All-time High Fund Distribution!

First $1M Gift!

Second $1M Gift!

50th Anniversary!

All-time High Fund Distribution!

First $1M Gift!

Second $1M Gift!

50th Anniversary!

All-time High Fund Distribution!

First $1M Gift!

Second $1M Gift!

50th Anniversary!

All-time High Fund Distribution!

First $1M Gift!

Second $1M Gift!

50th Anniversary!

All-time High Fund Distribution!

First $1M Gift!

Second $1M Gift!

50th Anniversary!

All-time High Fund Distribution!

First $1M Gift!

Second $1M Gift!

50th Anniversary!

All-time High Fund Distribution!

First $1M Gift!

Second $1M Gift!

50th Anniversary!

All-time High Fund Distribution!

First $1M Gift!

Second $1M Gift!

50th Anniversary!

All-time High Fund Distribution!

First $1M Gift!

Second $1M Gift!

50th Anniversary!

All-time High Fund Distribution!

First $1M Gift!

Second $1M Gift!

50th Anniversary!

All-time High Fund Distribution!

First $1M Gift!

Second $1M Gift!

50th Anniversary!

All-time High Fund Distribution!

First $1M Gift!

Second $1M Gift!

50th Anniversary!

All-time High Fund Distribution!

First $1M Gift!

Second $1M Gift!

50th Anniversary!

All-time High Fund Distribution!

First $1M Gift!

Second $1M Gift!

50th Anniversary!

All-time High Fund Distribution!

First $1M Gift!

Second $1M Gift!

50th Anniversary!

All-time High Fund Distribution!

First $1M Gift!

Second $1M Gift!

50th Anniversary!

All-time High Fund Distribution!

First $1M Gift!

Second $1M Gift!

50th Anniversary!

All-time High Fund Distribution!

First $1M Gift!

Second $1M Gift!

50th Anniversary!

All-time High Fund Distribution!

First $1M Gift!

Second $1M Gift!

50th Anniversary!

All-time High Fund Distribution!

First $1M Gift!

Second $1M Gift!

50th Anniversary!

All-time High Fund Distribution!

First $1M Gift!

Second $1M Gift!

50th Anniversary!

All-time High Fund Distribution!

First $1M Gift!

Second $1M Gift!

50th Anniversary!

All-time High Fund Distribution!

First $1M Gift!

Second $1M Gift!

50th Anniversary!

All-time High Fund Distribution!

First $1M Gift!

Second $1M Gift!

50th Anniversary!

All-time High Fund Distribution!

First $1M Gift!

Second $1M Gift!

50th Anniversary!

All-time High Fund Distribution!

First $1M Gift!

Second $1M Gift!

50th Anniversary!

All-time High Fund Distribution!
The 2022 Honors Gala

• More than 700 in attendance (SOLD OUT!)
• Raised over a half-million dollars
• Record-setting sponsorships
• Co-presented awards on stage with representative from across the profession
• Mission Moment raised over $150K to create an Endowment for the SOMA Foundation
Our Partnerships

• American Osteopathic Association
  • New Investigator Grant
  • Presidential Memorial Leadership Award
• Advocates for the American Osteopathic Association
  • Donna Jones Moritsugu Memorial Awards
  • Holiday Hugs Grants
• Osteopathic Specialties
  • Outstanding Resident of the Year Awards
  • AOAO Foundation O-REO Grant
• State Osteopathic Associations
  • State Emerging Leader Awards
Sharing Wisdom While Investing in Our Future: SOMA Foundation

• Student led and governed
• Fiscal structure (only) moved under AOF in 2021
• Established first investment fund in 2022
• Focused on building their brand
• Doubled fundraising last year
• Increased grant distribution program
• Balanced the budget
Our Asset Growth (Audited Numbers)

- Strong, consistent growth in the last four years
- Donor commitment is strong
- Fiscal Year ends Dec 31, 2022; audited FY22 will be available at HOD
Thank You

Dawn Tartaglione, DO, FACOS, DFACOS
President, American Osteopathic Foundation
Today’s Topics

• Management Transition
• Student Profiles
• Innovation
• AOA Profiles
• AOA Career Center
Management Transition Period

Executive Director
Kathleen S. Creason
kcreason@osteopathic.org
312-202-8047
916-217-8123 (cell)

Senior Director, Physician Services
Cynthia Penkala
cpenkala@osteopathic.org
312-202-6086

Director, Sales & Marketing
Joanne Constantine
jconstantine@osteopathic.org
312-202-8126

Director, Operations & Analytics
VACANT
312-202-8144

OPAC/Grassroots Manager
Chris Hughes
chughes@osteopathic.org
312-202-8760

Manager, Physician Payer Relations
Kim Popernik
kpopernik@osteopathic.org
312-202-6032

Administrative Assistant
Ran Flanders
rflanders@osteopathic.org
312-202-5898

Credentials Specialist
Gloria Bocanegra
gbocanegra@osteopathic.org
312-202-2822

Business Analyst
Victor Martinez Jr.
vmartinez@osteopathic.org
312-202-8160
# Management Transition Period

## Responsibilities Undertaken by Current Staff

<table>
<thead>
<tr>
<th>Role</th>
<th>Responsibilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Executive Director (AOA Interim CEO)</td>
<td>Student Profiles</td>
</tr>
<tr>
<td></td>
<td>Innovation Marketplace</td>
</tr>
<tr>
<td></td>
<td>Financial processes</td>
</tr>
<tr>
<td></td>
<td>Board Meeting Prep</td>
</tr>
<tr>
<td></td>
<td>DC Property Oversight</td>
</tr>
<tr>
<td>AOA Profiles Supervisor (Vacant)</td>
<td>Marketing activities</td>
</tr>
<tr>
<td></td>
<td>Analytics</td>
</tr>
<tr>
<td></td>
<td>Financial review</td>
</tr>
</tbody>
</table>
Task Force met in January and brainstormed:

**Student Benefits**
- Data for residency applications?
- CV development?

**End User Benefits**
- Assessing potential residents?
- Demonstration of experience?
Innovation

OMED 2022 Innovation Track
  • CME presentation available online

Innovation Marketplace
  • In planning stages
  • Connecting innovators with osteopathic expert resources
AOA Profiles

AOA Profiles Revenue by Fiscal Year

- $327,880

- FY21
- FY22
- FY23

June
July
August
September
October
November
December
January
February
March
April
May
AOA Career Center

Monthly newsletter
with career focused articles

12,000+ searchable jobs

Virtual Career Fair
April 11, 2023

April 11, 2023
5 - 8 PM ET
Thank You

Norman E. Vinn, DO, MBA, Chair
Association of Osteopathic State Executive Directors (AOSED)

Diana M. Ewert, MPA, CAE, President
AOSED Statement of Purpose

• Facilitate the development of strong divisional societies of the AOA
• Promote closer affiliation among divisional societies
• Provide communication, professional development, training and education
• Develop programs and materials to promote the osteopathic profession
• Provide input to the AOA
AOSED – Achieving its Purpose

• Educate
  • Annual HOD Program
  • Executive Directors Institute
  • Scholarships

• Collaborate
  • AOSED List Serve
  • Shared Resources
  • CO*RE REMS Program

• Generate Revenue
  • The CME Center/DO CME Online

• Provide Input to the AOA
  • AOA Bureau/Council/Committee positions
  • Discussions with Leadership

• Promote the Osteopathic Profession
Membership
• Students
• Residents
• Early Career Physicians
• Employed Physicians
• Late Career Physicians
Thank You

Diana M. Ewert, MPA, CAE, President
Council of Osteopathic Student Government (COSGP) Update

Anthony Sciuva, OMS III, National Chair
A Year in Review

• American Medical Association – Medical Student Section, May 2022
• Osteopathic International Alliance (OIA), June 2022
• National Osteopathic Student Caucus (NOSC), July 2022
• COSGP Summer Meeting, July 2022
• Osteopathic Medical Education Conference (OMED), October 2022
• COSGP Fall Conference, October 2022
• American Medical Association – Medical Student Section, November 2022
• COSGP Winter Conference, January 2022
**Fair Access in Residency (FAIR) Act**

- **Background:**
  - Medicare provides 71% of all GME funding
  - Federally-funded residency programs frequently:
    - Exclude DO applicants entirely
    - Require USMLE
  - Status quo is unsustainable

- **How We Got Here**
  - Many years pursuing engagement with residency programs that deny access to DOs or require the USMLE
  - High-level conversations with leaders in medical education to find effective solutions
  - Congressional action is needed to add transparency and ensure parity of opportunity for DOs applying to residency
What the FAIR Act Does
- Requires Medicare-funded residency programs to affirm that they accept DO applicants and COMLEX
- Requires residency programs to report on the number of DO and MD applicants and those accepted

117th Congress Review
- 5 cosponsors – 4 Rs/1D
- 51 national and state organizations signed coalition letter (to date)
- 28 National Orgs (osteopathic specialty colleges, NRHA, Benefis, the Wright Center)
- 23 State Orgs (two added this week)
- Grassroots engagement – over 4,000 messages sent to Congress!
Next Steps

- Reintroduction in the House
- Pursue Senate Companion Bill
- Increase House cosponsors
- Grow Coalition Support
National DO Day of Service

- Inaugural event with AACOM support to increase community service through TOUCH hour engagement
- Held annually on last Saturday of National Osteopathic Medicine (NOM) Week
- Organized and managed by COSGP in coordination with all COM Touch Coordinators
- Students, Staff, Faculty, and Physicians from all over the nation to serve their communities all at once.
- Goal
  - Increase the capacity and desire for community service across all COMs
  - Foster new relationships within medical communities
Thank You

Anthony Sciuva, OMS III, National Chair
Bureau of Emerging Leaders

Selena G.M. Raines, DO, Chair
BEL Members

- Selena G.M. Raines, DO, Chair
- Brian M. Fiani, DO, Co-Vice Chair
- M. Anjali James, OMS IV, Co-Vice Chair
- Daniel M. Krajcik, DO
- Owais Durrani, DO
- Janae Fry, DO
- Sara A. Lohbauer, DO
- Emily F. Chin, DO
- David O. Shumway, DO
- Katherine Taylor, OMS IV
- Matthew Santos, OMS IV
- Deepa Manda, OMS IV
- Chelsea A. Nickolson, DO
- Vanessa W. Halvorsen, DO
- Ryan L. Williamson, OMS IV
- Julieanne P. Sees, DO
Collaboration with AOA Leadership, Representatives and Staff

- Ernest R. Gelb, DO, FACOFP
- Ira P. Monka, DO
- Tim Beals, DO
- Maria Jones, DO
- Brianne Howerton, OMS IV
- Annie Phung, DO
- Kathleen S. Creason, MBA
- Maura Biszewski
- Priya Garg, MBA
BEL Workgroup Updates

• Advocacy
  • Working with the Public Policy team to schedule the next BEL Public Policy Roundtable.

• Communications
  • Continues to deliver quality content to the BEL constituents with themed quarterly newsletters.
  • Developed a new section called the Creative Corner.
    • A submission will be featured in the April newsletter.
  • Incorporated trivia questions within the newsletter to enhance engagement by sending AOA swag to one reader with the correct response.
  • October 2022 newsletter open rates:
    • New physicians in practice – 61.7%
    • Residents/Fellows – 39.4%
    • Students – 38%
  • Winter newsletter was released in January 2023.
BEL Workgroup Updates

• Resolutions
  • The following BEL resolutions passed at the 2022 House of Delegates:
    • H-217 Equality in Away Rotations/Sub-Internships for Osteopathic Medical Students (*Adopted as Amended*)
    • H-503 Amendment to the American Osteopathic Association Constitution – New Physician in Practice Definition (Second Read) (*Adopted as Amended*)
  • The team is hard at work on resolutions for 2023 HOD.

• Scholarships
  • Completed OMED 2022 with four scholarship recipients.
  • DO Day scholarship application cycle closed on January 31.
  • These are designed to increase membership numbers of residents and new physicians in practice.
BEL Workgroup Updates

- Professional Osteopathic Networking Database (POND)
  - Group has submitted a proposal for consideration to leadership.
  - Aims to develop a database of willing mentors that could be searchable by certain demographical and interest categories.
BEL Member Accomplishments

• Tim Beals, DO
  • Named to the editorial board of the Journal of Arthroplasty.
  • Published in the Journal of the American Osteopathic Academy of Orthopedics

• Owais Durrani, DO
  • Wrote a children’s book titled “Basketball, Science and Rockets.”
  • Wrote an article for NBC News titled “ER doctors are not your enemies.”

• Brian Fiani, DO
  • First neurosurgeon in world to host a spine surgery seminar in the virtual reality metaverse.
BEL Member Accomplishments

• Janae Fry, DO
  • Deputy Ambassador to Kenya for the ACEP International Section.
  • Founding Board Member, Director of Donor Relations of the Friends of Chogoria Hospital (Non-profit - Kenya).

• Daniel Krajcik, DO
  • Speaker at ACGME Annual Education Conference in February 2023.

• Sara Lohbauer, DO
  • AOA Leadership Academy inaugural cohort member.
BEL Member Accomplishments

• David Shumway, DO
  • Lectured at OMED 2022 on “Residency Hacks: How to Be More Efficient & Take Back Your Life.”
  • AOA Leadership Academy inaugural cohort member.
  • AOA TIPS Fellow 2022-2023.
  • Renewed appointment to The DO Editorial Advisory Board 2023-2024.

• Katherine Taylor, OMS IV
  • Inducted into the Gold Humanism Honor Society.

• Ryan Williamson, OMS IV
  • Member of the NBOME’s Student Experience Panel.
  • Only student member (representing both DO and MD students) on the AAMC’s ERAS Supplemental Application Workgroup.
Thank You

Selena G.M. Raines, DO, Chair
Osteopathic International Alliance (OIA) Update

Boyd R. Buser, DO, 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

New Secretariat:

• Raine Richards, JD replaced Amy Byerwalter, MA
**Membership**

**73 Member Organizations**
- 15 Full Members
- 8 Associate Members
- 50 Partner Members

**New Full Member Organization**
- Norwegian Association of Osteopathy

**New Partner Member Organizations**
- Conservatoire Supérieur d'Ostéopathie de Paris
- Nova Scotia Association of Osteopaths
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 90% completed

➢ Updating the Benchmarks for Training of Osteopathy
  o Awaiting identification of new TCM Director
  o Will include osteopathic medicine
Upcoming Events

2023 Annual General Meeting & Conference:
- October 19 – 21, 2023
- London, England
- Hosted by Institute of Osteopathy, working with General Osteopathic Council
- Theme: “Delivering and developing excellence in osteopathic healthcare”
- Developing more student-oriented content

2023 World Osteopathic Healthcare Week:
- April 17 – 23, 2023
- Theme centers on sharing information about osteopathic regulation and research worldwide
- Toolkit will be shared with OIA members & on OIA’s website
Thank You

Boyd R. Buser, DO, Chair

More information: www.oialliance.org
Society of Osteopathic Specialty Executives (SOSE) Update

Carol L. Houston, President
Increased Collaboration and Communication with AOA

- AOA Bureaus/Councils/Committees
  - Affiliate Relations
  - Osteopathic Education
  - Federal Health Programs
  - Membership

- CEO Hosted Quarterly Affiliate Calls

- Dues Billing service

- OMED
OMED 2020
- 14 Specialty Colleges participated
- 3,862 total attendees

OMED 2022
- 17 Specialty Colleges Participated
- 6,900 total attendees
- 12 Specialties Participated in the SOMA Mentor Café

Coming in OMED 2023
- List of attendees in our specialty to use for membership recruitment
2023 Affiliate Leadership Meeting – choosing date

Board of Trustees Midyear General Session · Wednesday, February 22, 2023
Thank You!!!

Powered by Giphy
Thank You

Carol Houston, President
Student Osteopathic Medical Association (SOMA) Update

Courtney Merlo, OMS IV, National President
Working for the Future of Osteopathic Medicine
Recruiting Engaged Future Leaders

- 4,394 new SOMA members
  - Over 14,200 members in total
- 1 new chapter
  - Lake Erie College of Osteopathic Medicine - Elmira
- 1 new auto-enroll chapter
  - California Health Sciences University College of Osteopathic Medicine
- Impacting the future of the profession
  - Students continue traveling on this leadership trajectory into their careers
  - SOMA-AOA recruitment teamwork
Growing Interest in Osteopathic Medicine

- 134 new PreSOMA members
  - Launch of a paid membership
- Engaged in pursuing osteopathic careers
  - 63 in-person attendees at OMED
- Pre-Medical Student Programming
  - PreSOMA Osteopathic Bootcamp
  - Medical school application workshops
  - Cultural competency and addiction medicine seminars
  - OMM Education videos
  - Osteopathic medical student mentorship program
- National ShaDO Week | March 27-30th, 2023
- Expansion of PreSOMA leadership
  - Addition of a Health Disparities Director
Welcoming SOMA Alumni Members

- Alumni engagement at OMED
  - SOMA Alumni reception
  - Mix & Mingle Mentorship event
  - Residency Meet & Greet
- Join our alumni network
  - Mentorship opportunities
  - Advocacy involvement
  - SOMA Alumni member discounts
Fostering Student Interests

• A focus on osteopathic medicine & wellness
  • #DOProud social media campaign
  • Wellness scavenger hunt
  • OMM video demonstrations for pre-medical students

• Giving back to our COMmunity
  • Charity Miles competition
    • Over 100,000 miles
    • Raised $25,142.50
Fostering Student Interests

• Emphasizing diversity, equity, and inclusion
  • AOA workgroup collaboration to launch The Food Insecurities Project
  • Created and released the POC Dermatology Toolkit
  • Premiered the SOMA Advocacy in Action Series
    • Transgender health
    • Population trauma
    • Imposter syndrome
  • Social Medicine Toolkit coming Spring 2023
Fostering Student Interests

• A new generation of research engagement
  • SOMA Fall research symposium
    • Over 50 abstract submissions
  • Launch of the SOMA Magazine
    • 54 research and creative article submissions
  • Publication of the SOMA Research Website
    • StudentDOResearch.org
  • National study on barriers to research among DO students
    • Accepted for publication by the Journal of Osteopathic Medicine
Osteopathic Medical Student-Centered Programming

- Record breaking student attendance at OMED
  - 1994 virtual and in-person student registrants
  - 1096 in-person student attendees

- Student Track Sessions
  - Basics of Advocacy & Letter Writing
  - Financial Literacy in Medical School Curricula
  - Trauma Informed Care
  - Effective Use of Social Media in Healthcare

- Future Call-To-Action
  - Collaboration is key to successful student attendance
Working to Effect Positive Change

• SOMA Fall House of Delegates
  • Resolution topics with requests of the AOA:
    • Use of non-stigmatizing language for persons that have returned to substance use
    • Use of Native American land acknowledgments before events
    • Allowing adequate time for osteopathic medical students to vote free from academic penalty
    • Acknowledging voter registration as a social determinant of health
Representing the Osteopathic Medical Student Voice

• **Sharing membership feedback**
  - NBOME Liaison Committee Meeting
  - NRMP Two-Phase Match
  - COCA Report

• **Serving as the voice of our membership**
  - AMA-MSS Interim House of Delegates
  - AMSA House of Delegates
  - AMEC23 Educating Leaders Conference

• **Recent efforts alongside stakeholder organizations**
  - Latino Medical Student Association
  - Canadian Osteopathic Medical Student Association
  - Council of Osteopathic Student Government Presidents

...and many more
Impacting Local COMMunities

• Chapter Level Engagement
  • Regional Health Summit Conference
  • Combating opioid use disorder
  • Fundraising for oncology research
  • Focus on health literacy
  • Pre-SOMA mentorship
  • CV workshops
Developing Accomplished Leaders

• **Chapter of the Year:** Burrell College of Osteopathic Medicine

• **Young Chapter of the Year:** Virginia College of Osteopathic Medicine – Louisiana

• **Officer of the Year:** Polly Wiltz, DO
Giving Back to Our Membership

• Scholarships to support osteopathic medicine
  • SOMA Foundation awarded over $9,500 in Fall Scholarships
  • $3000 in OMED travel grants

• SOMA Foundation programming
  • SOMA Foundation/American Osteopathic Foundation Student Art Auction
  • Ignite the Future lecture series

• The future of SOMA Foundation leadership
  • Chairperson: Jantzen Faulkner, OMS-III
    • Extended to 2-year-term
  • Vice Chairperson-elect: Athena Masi, OMS-II

• Expansion of SOMA Foundation leadership
  • Addition of a Director of Fundraising
• A new generation of SOMA leadership
  • President-elect: Rebecca Wolff, OMS-III
  • Vice President-elect: Stephanie Koplitz, OMS-III
  • National Board of Directors Chair-elect: Lawsen Parker, OMS-III
  • Parliamentarian-elect: Cade Robinson, OMS-III
  • Treasurer-elect: Lindsay Hock, OMS-III
  • Secretary-elect: Kailey Jacobson, OMS-II
  • Region I Trustee-elect: Cassandra Haloub, OMS-II
  • Region II Trustee-elect: Tyson Hillock, OMS-II
  • Region III Trustee-elect: Jennifer Wilson, OMS-II
  • Region IV Trustee-elect: Nathaniel Gentry, OMS-II
  • Region V Trustee-elect: Sara Hirshman, OMS-II
  • SOMA Foundation Chairperson: Jantzen Faulkner, OMS-III
  • AOA Student Trustee: Anjali James, OMS-IV
2022-2023 Leadership Team
Thank You

Courtney Merlo, OMS IV, National President
president@studentdo.com
Written Reports
American Osteopathic Foundation Report to the 
Board of the American Osteopathic Association

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

February 2023

Colleagues:

Since our founding, the American Osteopathic Foundation has supported, funded, and accelerated the work of the Osteopathic profession. Together, with the generosity of our donors and the strength and vision of our partners, we are making a positive impact in the communities we serve—locally, nationally, and across the globe.

The American Osteopathic Foundation would like to acknowledge its appreciation of the American Osteopathic Association and our longstanding, mutually beneficial partnership. I am pleased to provide this report to the Board of the American Osteopathic Association.

Our Evolution and Impact

We began in 1949 as The Osteopathic Foundation, providing and managing loans for Osteopathic medical students. Even now, that early charter continues its ripple effect as evidenced by the hundreds of loan recipients that have gone on to make indelible marks in Osteopathic medicine.

In our more than 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, grant, and award programs that are celebrating impressive milestones such as the Donna Jones Moritsugu Memorial Award, presented in partnership with the Advocates for the American Osteopathic Association, which turns 30 this year. The William G. Anderson, DO, Minority Scholarship, which just passed the 20-year mark. The Sterling G. Welch, DO Scholars Grant, also at 20 years, and the Karen J. Nichols, DO, LEAD Scholar Award which turns 10 this year. Behind each one is an individual who wanted to have a lasting impact on our profession through their philanthropy.
We also recognize and acknowledge donors who have surpassed milestones of 20, 25, and 30 years of consecutive giving and we are increasing our outreach to individuals who want to secure their legacy by naming the Foundation in their will or estate plan.

The Foundation attracts hundreds of grant, scholarship, and award applicants every year. And through our enhanced outreach to, and collaborations with, Osteopathic medical schools, State Osteopathic Affiliates, Specialty Affiliates, and others, the impact of the Foundation’s programs has grown substantially in the last five years, having nearly doubled our output.

We celebrate all of this and more. This past October more than 700 attendees gathered to recognize the extraordinary accomplishments of people across the Osteopathic profession at our 2022 Honors Gala in Boston. The sold-out event raised more than $500,000 in support of our mission and an additional $155,000 was raised during the Mission Moment to create an endowment that will benefit the SOMA Foundation. This was a record-setting year, and we are immensely grateful to all of the sponsors and donors that made it happen!

Ultimately, our Board of Directors has the fiduciary responsibility for all donations and charitable funds. We invest our assets judiciously, according to policies and objectives, ensuring thoughtful and effective grantmaking today while ensuring assets are available for grantmaking in the future. We strive for consistency and transparency in our stewardship which has been positively reflected through our earned Gold Seal of Transparency for 2022 and again for 2023 from Candid/GuideStar.

**Strategic Initiatives**

The Board of Directors embarked upon the creation of a new five-year strategic plan that strives to double the amount of assets under management to ensure the stability of core programs and to increase distributions over time; triple the number of grants/scholarships given away annually to meet the growing needs of the student population; build our brand while elevating the entire profession within the healthcare space; significantly enhance new investigator research initiatives through collaborative partnerships; and facilitate open, authentic discussions across the profession in continued pursuit of the higher ground.

At the time of this report, it is a privilege to communicate all aspects of the strategic plan have been addressed, are ahead of goal, and are on track for success that will ultimately benefit those we seek to serve.
We go farther...together

We know that great things are rarely done by one person or one organization and that the strength of the Foundation has consistently been generated through the collective commitment of the profession – its students, practitioners, organizations, and supporters.

Our adoption of the Student Osteopathic Medical Association (SOMA) Foundation in 2021 has produced noticeable growth for this volunteer, student-governed organization. Through their Board’s leadership, and with the Foundation’s guidance, the SOMA Foundation invested assets for the first time, developed a historic records database, started a national fundraising campaign, developed new brand standards, and introduced two new grants/scholarships. It has been an honor to watch the SOMA Foundation prosper and thrive under this new structure.

Our collaborative partnerships have grown deeper as evidenced by the inaugural Donna Jones Moritsugu Memorial Award Virtual Happy Hour in 2022, designed with the AAOA, that recognized and celebrated spouses of graduating medical students.

In 2021 and 2022, we pulled together healthcare experts, program directors, and nationally recognized researchers to create Continuing Medical Education (CME) sessions, which debuted at OMED, as part of our LGBTQ+ Health Equity and Inclusion Initiative, to benefit the field.

Project Future, one of our most audacious initiatives, is engaging subject matter experts from the profession from across the country. We are drawing on their experience and expertise to provide observations based on topics such as professional identity and Osteopathic medical education. We will soon be convening a diverse group of thought leaders to participate in Impact Forums to reflect on these observations and highlight opportunities that can be utilized to construct action plans to protect, foster, and grow the Osteopathic profession.

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.

Respectfully submitted,

Dawn Tartaglione, DO, FACOS, DFACOS
President
SNMA Osteopathic Committee Report to AOA Mid-Year Meeting 2023
February 22, 2023 – February 23, 2023

Osteopathic Committee (OSC) Leadership:
Torhiana Haydel, Co-Chair
Claudine Nwadizor, Co-Chair
Dominique Cameron, Vice-Chair Mentorship
Selamawiet Belay, Vice-Chair Outreach
Cherita Moore, AOA Liaison

OSC Meeting Dates and Times:
SNMA Regional Liaison Meetings, 2nd Sunday of each Month
SNMA OSC General Committee Meetings, 3rd Sunday of each Month
AOA Liaison meetings, mid-year meetings and as needed

Narrative:
The 2022-2023 Osteopathic Committee has focused on increasing national membership within our committee, providing essential programming to meet the needs of minority osteopathic students, a DO specific mentorship initiative, ensuring osteopathic resident and physician representation is at the 2023 Annual Medical Education Conference, and maintaining equitable partnerships with osteopathic organizations such as SOMA and AACOM. The SNMA and osteopathic committee has appreciated the support of the AOA and look forward to continuing the collaborative efforts to increase minority representation for the osteopathic medical profession.

- Fall events:
  - Vaccine Hesitancy Panel
  - COMLEX OMM Prep
  - Journey to Becoming a Physician: An Osteopathic Approach

Upcoming Events:
February 1-23: Black History Month Series with weekly facts of the contributions that African-Americans have made to the osteopathic medicine community and overall medical field. At the end of the month, we hope to have 1-2 DO African-American physicians speak on their journey and changes they’ve experienced over time since becoming a physician. We will share the date and flyer with the AOA once we have it confirmed.

April 5-9: 2023 Annual Medical Education Conference will be held in Hartford, Connecticut at the Connecticut Convention Center. We would like to say thank you again to the American Osteopathic Association for donating OMM tables to be utilized for our OMM Skills Session.

Conference Osteopathic Programming:
- Introduction to Osteopathic Medicine for pre-medical students
- COMLEX Level 1 and 2 Prep Sessions
- DO physicians from various specialties speaking on their journeys and experiences
- How to be A Successful Sub-I for 3rd year students
- DO Post Match session from successful 4th years
- OMM Skills session
- Osteopathic Breakfast with keynote speaker Dr. Barabara Ross Lee
Future Collaborations with the AOA:

- Sponsorship Request for the Osteopathic Breakfast or an AOA sponsored reception for networking for AMEC 2024
- Initiative to get more minority students involved with research. We would like students to be aware and submit articles for the Journal of Osteopathic Medicine
- Initiative to get more minority students involved with The DO
- Ensure a member of the SNMA is present for DO Day on Capitol Hill