2021 ANNUAL BUSINESS MEETING OF THE 
BOARD OF TRUSTEES 
General Session 
(Affiliate Leaders included) 
Wednesday, July 14, 2021 · 10 am – 2 pm CT 
Click here to register

<table>
<thead>
<tr>
<th>Time</th>
<th>Session</th>
<th>Presenter(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>10 am</td>
<td>Call to Order and Welcome</td>
<td>Thomas L. Ely, DO, President</td>
</tr>
<tr>
<td></td>
<td>Roll Call and Quorum Establishment</td>
<td>Kevin M. Klauer, DO, EJD, CEO</td>
</tr>
<tr>
<td></td>
<td>Osteopathic Pledge of Commitment / AOA Mission and Vision Statement</td>
<td>Thomas L. Ely, DO, President</td>
</tr>
<tr>
<td></td>
<td>Invocation</td>
<td>Teresa A. Hubka, DO</td>
</tr>
<tr>
<td>10:10 am</td>
<td>Action Items:</td>
<td>Thomas L. Ely, DO, President</td>
</tr>
<tr>
<td></td>
<td>• Conflict of Interest Disclosures</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Adoption of Agenda</td>
<td></td>
</tr>
<tr>
<td>10:15 am</td>
<td>Leadership Reports</td>
<td>Thomas L. Ely, DO, President</td>
</tr>
<tr>
<td></td>
<td>President Report</td>
<td>Thomas L. Ely, DO, President</td>
</tr>
<tr>
<td>10:25 am</td>
<td>President-Elect Report</td>
<td>Joseph A. Giaimo, DO, President-Elect</td>
</tr>
<tr>
<td>10:35 am</td>
<td>CEO Report</td>
<td>Kevin M. Klauer, DO, EJD, CEO</td>
</tr>
<tr>
<td>10:45 am</td>
<td>Bureaus, Committees and Councils Goals Report</td>
<td>Thomas L. Ely, DO, President</td>
</tr>
<tr>
<td>10:55 am</td>
<td>AOA Operational Updates</td>
<td>Nicole Blankenship, VP, Affiliate Relations</td>
</tr>
<tr>
<td></td>
<td>Affiliate Relations</td>
<td>Nicole Blankenship, VP, Affiliate Relations</td>
</tr>
<tr>
<td>11:00 am</td>
<td>Break</td>
<td></td>
</tr>
<tr>
<td>11:10 am</td>
<td>Certifying Board Services</td>
<td>Andrea Ciccone, SVP, Certifying Board Services</td>
</tr>
<tr>
<td></td>
<td>• Longitudinal Assessment Update</td>
<td></td>
</tr>
<tr>
<td>11:15 am</td>
<td>Communications and Marketing</td>
<td>Lori M. Wemhoff, SVP, Communications and Marketing</td>
</tr>
<tr>
<td></td>
<td>• Social Media Impact</td>
<td></td>
</tr>
<tr>
<td>11:20 am</td>
<td>Diversity, Equity and Inclusion</td>
<td>Priya Garg, Chief Engagement and Diversity Officer</td>
</tr>
<tr>
<td></td>
<td>• Student Summit</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Return to Office Plan</td>
<td></td>
</tr>
</tbody>
</table>
11:25 am  Graduation Medical Education
- Communication Plan
- Governance Department Chair Perspective
  Maura Biszewski, VP, Graduate Medical Education

11:30 am  Human Resources
- Annual Compliance Training
  Kimberly Saka, AVP, Human Resources

11:35 am  Membership
- Dues Invoicing
- Resident and Fellow Recruitment / Retention Marketing Plan
- Governance Department Chair Perspective
  Mollie Pillman, SVP, Membership Services
  Richard R. Thacker, DO, Chair, Professional Affairs / Membership

11:45 am  Physician Education and CME
- CME Submission Processing
- Department Restructuring
  Jeff Fraler, AVP, Physician Education and CME
  Alanna Kaiser, Director, Physician Education and CME

11:50 am  Public Policy
- White Papers
- DO Day 2022
- Legislative Priorities (Pending BOT approval)
- Governance Department Chair Perspective
  David Pugach, SVP, Public Policy
  Teresa A. Hubka, DO, Chair, Governmental Affairs

12:00 pm  Strategic Partnerships
- Partnership Update
- Grant Outcomes
  Darcy Steinberg-Hastings, VP, Strategic Partnerships and Health Initiatives

12:10 pm  OMED 2021
- Logo, Theme, Logistics
- Governance Council Chair Perspective
  Kevin M. Klauer, DO, EJD, CEO
  Nicole Blankenship, VP, Affiliate Relations
  Peter B. Ajluni, DO, Chair, Council of OMED

12:20 pm  Break

12:50 pm  House of Delegates Update
  David L. Broder, Vice Speaker, House of Delegates

**Organization Reports**

12:55 pm  American Osteopathic Information Association (AOIA)
  Norman E. Vinn, DO, Chair

1:05 pm  Bureau of Emerging Leaders
  Greg E. Harris, DO, Chair

1:15 pm  Council of Osteopathic Student Government Presidents (COSGP)
  Jose Parra, OMS III, President

1:25 pm  National Board of Osteopathic Medical Examiners (NBOME)
  John R. Gimpel, DO, President & CEO

1:35 pm  Student Osteopathic Medical Association (SOMA)
  Nicholas C. Harriel, OMS IV, President
1:45 pm  Recognition of Outgoing Advisors and Members of the AOA Board of Trustees
- William S. Mayo, DO
- Joseph M. Yasso, DO
- Vanessa W. Halvosen, DO 
  *Postdoctoral Trainee Advisor*
- Caleb B. Hentges, DO 
  *Postdoctoral Trainee Member*
- Annie Phung, DO 
  *Student Advisor*
- Edith Waskel, DO 
  *Student Member*

1:55 pm  Closing Remarks
- Thomas L. Ely, DO, President

2 pm  Adjournment
- Thomas L. Ely, DO, President

Organization Written Reports
Organization Written Reports
AACOM Application Service (AACOMAS): The 2020-2021 AACOMAS application cycle launched on May 5, 2020 and closed to applicants on April 30, 2021. The number of applicants closed at 22% higher than last year, and designations closed at 19% over the 2019-2020 application cycle making last year’s total the largest application pool in AACOM’s history. To date in the 2021-2022 application cycle, the number of applicants is down 11% from last year at this time, but 21% higher than the 2019-2020 cycle. Likewise, designations are down 7% from 2020-2021 but up 20% from 2019-2020.

New Education Program: We launched a pilot educational program focused on health, healthcare careers and osteopathic medicine called “Doctors and What They DO.” It features 10 lessons developed using the common core standards for 3rd-6th graders, ranging from half hour to fifty-minute sessions. This virtual program has 96 young students enrolled (out of 100 available seats!) and 30 osteopathic medical students began teaching them in early June.

Match Initiatives: AACOM is working to conclude our Match Survey and publish final residency placement statistics next month. Earlier this year AACOM recognized the largest class of DO students ever to participate in the National Resident Matching Program’s (NRMP) Match Week. According to NRMP, the number of U.S. DO seniors participating was a record-high 7,101, an increase of 7.9 percent over 2020. Of those, 6,327 matched to first-year residency positions, a 6 percent increase from 2020 and the highest number ever. The proportion of total positions in the Match filled by DO students increased from 2020, as well.

We also launched a new residency unfilled positions site to provide residency programs a platform to share their available positions with osteopathic medical students and advisors. In addition, we updated our Match resource page on the aacom.org website, with additional videos to encourage our students before Match Week and a message from our president and CEO.

GME Initiatives: AACOM is keeping a list of institutions and residency programs that either prohibit DO students from participating in audition rotations at their facilities or have more burdensome charges or requirements for DO students. AAMC asked Mark Speicher to sit on the now-forming VSLO Advisory Council where this item will be a standing agenda report, and we are working with AAMC to develop a strategy for reaching out to institutions where these kinds of biases exist. We shared this information with Josh Prober at the AOA, as well as with our Government Relations department for additional actions. We appreciate the AOA’s work with individual programs to reduce these biases.
Working with AAMC, ECFMG and ACGME, we released a toolkit in March to help rising fourth year medical students, Colleges of Osteopathic Medicine (COMs) and residency programs prepare for the start of the new academic year. AACOM’s residency readiness resources for incoming trainees are among the various resources available. And AACOM continues to collaborate with the ACOFP’s Committee on Osteopathic Recognition Development (CORD) to support programs seeking Osteopathic Recognition, and together published a toolkit in April to include sample evaluations and resources to help with the application.

**Competency Development:** AACOM is working with the AAMC and the ACGME to provide two important pieces of information to COMs about their graduates. The Residency Readiness Survey (fielded by the AAMC) was recently opened to all COMs, after including 10 COMs in its pilot program last year. Most COMs currently survey program directors; this common survey would replace those individual surveys, and COMs will get responses from Program Directors on individual graduates while reducing the workload on residencies.

Additionally, AACOM’s National Academy of Osteopathic Medical Educators developed “Guidance in Use of ACGME Milestone Data in Undergraduate Medical Education” that will soon be available on a new section of AACOM’s website with other “readiness for residency” resources. The work provides support for COMs using the milestone data provided annually by ACGME. The data provided to each COM in 2021 was aggregate data, but beginning in 2022, each COM will receive data on individual graduates (who have permitted the ACGME to share this information with their COM). In this way, AACOM is helping COMs incorporate the success of their graduates in meeting their residency milestones into a review of the COM’s curriculum with the hope that demonstrating that our COMs use this data effectively to improve their graduates’ readiness for residency, will attract program directors to take more COM graduates.

**Research:** The 2020-21 Annual Osteopathic Medical School Questionnaire (Annual Survey) was released in March 2021 and closed in June 2021. Data from this Annual Survey should be available in July 2021. Annual Survey data is used to generate reports and dashboards on enrollment, allied health and graduate programs, medical school faculty, curriculum, etc. 2020-21 enrollment and 2019-20 graduate reports will be available via AACOM Reports in June 2021.

The 2020-21 Graduating Senior Survey was fielded in late March 2021. This survey collects data on graduates’ experience in medical school, their plans to practice, etc. We are preparing the Entering Student Survey to release in early July, 2021. This survey collects information from matriculants on their expectations for medical school, residency, board certification and practice, as well as information on undergraduate and medical school debt.
New Grassroots Advocacy Action Center and Updated Resources: To harness membership engagement, influence federal policy and provide updates on legislative and regulatory priorities, GR launched a new, online, grassroots Action Center. Members can connect directly with Congress in support of legislation and comment on regulatory proposals impacting the osteopathic medical education (OME) community. Additionally, GR restructured the COM congressional representation chart to include a map of COM locations and an interactive list of schools.

Students Assist America: On behalf of our interprofessional initiative Students Assist America (SAA), AACOM is spearheading a legislative initiative to pass the Student Assisted Vaccination Effort (SAVE) Act, which was introduced by Senators Mark Kelly (D-AZ) and Susan Collins (R-ME) on June 17th. The SAVE Act makes permanent the Seventh Amendment to the Public Readiness and Emergency Preparedness (PREP) Act Declaration and authorizes students from designated health professions to administer vaccinations and assist during future public health emergencies. The introduction of the SAVE Act builds upon the Biden Administration’s adoption of SAA’s priority to provide liability protections for health professions students who administer COVID-19 vaccines.
In my role as AAOA President this year, I have worked with my dedicated AAOA board who are full of energy and ideas about advocating for the Osteopathic Profession. We each represent varied periods of time throughout the professional journey. Our board this year is diverse in experience and gender to represent the varying DO family perspectives. We have student and resident spouses, experienced individuals and those who are not spouses but rather family members, friends, and colleagues of Osteopathic Physicians like myself. I think this speaks volumes to the commitment and passion our board has for the AAOA, and for Osteopathic advocacy in general. We believe strongly that this is key to our continued success and relevance.

Since I last presented to you, we have continued to make progress in many areas of our organization. Remote meetings and webinars have taken place on their regular schedule. We have cleaned our house, so to speak, by doing work to update our strategic plan. Our updated pillars will help us to identify and put our energy into those things that truly fit our strategic plan.

Our partnership with the AOF has continued to develop as we work together to celebrate Physician spouses who go above and beyond with the Donna Jones Mortisugu Award. This award recognizes the partners of graduating osteopathic medical students who have supported and been involved with their loved one’s career throughout medical school. These recipients are selected by the various COMs. The second annual Holiday Hug Grant also in conjunction with the AOF will be selected from many applicants of our student families. Together with the AOF we are working to assure our continued contact and inclusion of these award winners. Obviously what they have done has not gone unnoticed and they can surely inspire those who come after them from within our Advocacy group.

The AAOA continues to invest time and energy into the development of our SAA (Student Advocate Association) and IRAA (Intern Resident Advocate Association) chapters around the country. We are working to form a new SAA group in Arkansas together with interested people on campus. We continue to work to identify IRAA individuals and groups. With the latest suggestion by the AOF we will hold a joint Virtual Happy Hour - inviting and celebrating the last few years of Mortisugu Award recipients.

We continue supporting SOMA and special projects, with the proceeds of our annual Fun Run at OMED. The virtual Fun Run was well received and participation remotely will be part of our future.

- $2500 in scholarships annually at OMED for medical students.
- $9000 supports special projects for Osteopathic student families.
- $500 awards a Holiday Hug for worthy student families.

This October we will also be hosting our annual Still Fit for Life Fun Run both virtually and in person, and we are honored to have Dr. & Mrs. Ronald Burns serve as our Honorary Co-Chairs.
Please consider supporting our Fun Run or the advocates in any way. This money will go directly to support our mission of supporting all of you and DOs across the country. You can make a donation quickly by checking out our webpage at https://www.advocates4dos.org/store?category=Donation%2FSponsorship. Please consider supporting our mission!

This year our webinars have included

- Fax about the VAX, using three outstanding DO’s to provide vital information.
- Surviving and Thriving in the DMD Lifestyle: How the D.M.D Method can help you become a better spouse and parent.

In the late winter, past president Angela Kalcec and I were featured in a podcast with Lara McElderry of Married to Doctors fame. You can check that out on your favorite podcast platform.

This year we are fortunate to continue to have Lawrence Cunningham as our executive director and have met with many new faces at the AOA. Betsey Siska in Affiliate Relations has been so helpful and so encouraging, we thank the AOA for the foresight to find people like her. We thank the AOA overall for their continued partnership and opportunities to collaborate and look forward to future collaboration and some face-to-face time. We couldn't do it without the amazing support of our advisor Dr. Garza and all of you. Thank you for ALWAYS supporting what we DO.

We are not certain of many things in this world, but we are certain there is a need for Osteopathic Physicians and therefore we continue to advocate for you, because We are all in this together.

Respectfully submitted,
Caryn Tabby
President, 2020-2021
Advocates for the American Osteopathic Association
AMERICAN ASSOCIATION OF OSTEOPATHIC EXAMINERS
JULY 2021 REPORT TO THE AOA BOARD OF TRUSTEES

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

We currently have representatives on 47 out of the 51 possible regulatory boards (only Alaska, DC, Louisiana and Massachusetts lack osteopathic representation). The AAOE typically meets three times a year, once in the winter, once at the Annual Meeting of the FSMB in the spring and once at the AOA’s House of Delegates in the summer.

Keeping AAOE Fellows Updated on Important Health Policy Trends

The AAOE held its most recent (virtual) business meeting on April 29th, in conjunction with the FSMB’s Annual Meeting. During the meeting, FSMB President and CEO Humayun Chaudhry, DO provided an update to the group on:

- The FSMB’s work related to COVID-19, including:
  - Creation of the Emergency Preparedness and Response Workgroup;
  - Elimination of the Step 2-Clinical Skills portion of the United States Medical Licensure Examination;
  - State and territorial responses to COVID-19;
  - Physician stress and burnout resulting from COVID-19;
- The status of the Interstate Medical Licensure Compact – at present, 29 states, the District of Columbia and the Territory of Guam are members.

Next, the National Board of Osteopathic Examiners’ (NBOME) President and CEO John Gimpel, DO, Board Chair Geraldine O'Shea, DO and Board Vice Chair Richard LaBaere presented an update on:

- The NBOME’s Response to COVID-19:
  - Temporary suspension of the Level 2-Performance Evaluation component of the Comprehensive Osteopathic Medical Licensure Examination
  - Creation of a Special Commission on Osteopathic Medical Assessment to identify temporary pathways for graduates of the Class of 2021 and 2022, and a more permanent solution thereafter. Two members of the AAOE serve on the Special Commission: Alexios Carayannopoulos, DO, MPH and J. Michael Wieting, DO.

The AOA’s Director of State Government Affairs and AAOE Staff Liaison, Raine Richards, JD, presented an AOA update regarding the impact of COVID-19 on state legislative activity and AOA advocacy:
• The AOA’s Council on State Health Affairs added emergency preparedness and enhanced federal-state-local coordination to its list of 2021 state advocacy priorities.

• This year, the AOA has partnered with state and specialty affiliates to advocate on legislation including:
  o Protections to shield physicians from additional liability for services rendered in response to a disaster
  o Enhanced coverage and payment for telehealth services
  o Retaining physician leadership of the health care team, following emergency state declarations to expand non-physician clinicians’ scope of practice during the pandemic
  o Equivalent recognition of osteopathic physicians and medical students, as well as osteopathic examinations and board certifications
  o Access to affordable health care and prescription drugs

The AOA is currently working with the NBOME and the Indiana Osteopathic Association to request amendments to Indiana’s medical licensure regulations to update terminology related to osteopathic physicians, medical schools and examinations.

AAOE Advocacy
In light of the recent decision to suspend COMLEX Level 2-PE, the AAOE has been conducting research and outreach to select state boards to ensure that DOs are eligible to enroll – and continue in – postgraduate training without undue burden or delay.

Of the states that require postgraduate trainees to obtain a temporary license, only California, Louisiana, Massachusetts, North Carolina and Vermont have been identified as requiring applicants to pass COMLEX Level 2. None of the states except North Carolina define “COMLEX Level 2,” however, and the AAOE is working to ensure that the current, single-component version of the exam meets their requirements.

North Carolina’s regulations do require applicants for a resident training license to pass “each component of COMLEX Level 2 [cognitive evaluation and performance evaluation];” however, in response to the AAOE’s letter, the North Carolina Medical Board indicated that it is updating its regulations to reflect the recent suspension of Level 2-PE.

AAOE Internationally
Traditionally, AAOE leaders have represented the US osteopathic medical regulatory community at the annual Osteopathic International Alliance (OIA) General Meeting and the biennial International Association of Medical Regulatory Authorities’ (IAMRA) International Conference on Medical Regulation. The fall 2020 IAMRA meeting was postponed due to COVID-19, but has been rescheduled as a virtual meeting which will take place on October 12 – 14, 2021. The OIA meeting was also postponed, but took place virtually on May 19, 2021, and AAOE President Alexios Carayannopoulos, DO, MPH represented the AAOE.

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

Respectfully submitted,

Alexios Carayannopoulos, DO, MPH
President, AAOE
AOF – AOA Board of Trustees Report

Submitted by Jeffrey S. Grove, DO, FACOFP, dist.

Friends and Colleagues:

At the American Osteopathic Foundation, supporting programs and services that promote Osteopathic medicine and enhance patient-centered care is the reason we exist. For more than 70 years, the AOF has invested resources and provided support that uplifts the entire field. It is an honor and privilege that we do not take lightly.

We are incredibly grateful for our long-standing partnership with the American Osteopathic Association. Together, with the collective commitment and support of today’s leadership, as well as from those who charted the course before us, we are building on solid ground to envision a new future.

Board of Directors and Professional Staff
Our board is an outstanding, diverse group of individuals from across the country comprised of Osteopathic physicians, educators, student leaders, and corporate representatives who believe in and support the Osteopathic profession.

In January 2021, the Foundation welcomed two new board members, they are:
   • Franklin Beamer, Hall of Fame, former Virginia Tech Football Head Coach
   • Jeffrey Edwards, OMS II – SOMA Student Director

Under this leadership, and along with professional staff, we launched a new five-year strategic plan in January. Six months in, we are making tremendous strides.

Financials
The AOF recently completed its annual audit for our fiscal year ending December 31, 2020, which was ruled a “clean audit” by the auditors.

With direction from the board and prudent execution by our staff, we have been able to streamline our budget and reduce expenses for four years in a row.

This and other financial information will be highlighted in our annual report set to be released mid-July.
**Fundraising and Donor Stewardship**

The AOF enjoys a loyal base of donors, all of whom are critical in realizing our mission. We are heartened by the annual generosity of members of the Osteopathic medical profession in support of our many programs. These donations allow individuals, foundations, corporations, and affiliates to impact Osteopathic medicine on a national level.

As we increase the connections of our mission-aligned donors to new and innovative opportunities, we are growing our donor-centric model allowing for greater investment and involvement. We now have available, a variety of fund options, such as donor advised funds, co-funded grants, and named scholarship funds, to meet the objectives of many of our donors and affiliate partners, and to ultimately increase the Foundation’s impact.

Because of this expansion of services, the Foundation acquired its second million-dollar commitment this past year that will provide new scholarships and create CME training as part of AOF’s LGBTQIA+ Health Equity and Inclusion initiative.

In addition, we are increasingly working with individuals who want to secure their legacy by naming the Foundation in their will or estate plan through our Osteopathic Legacy Society. This is the simplest way to create a legacy and I encourage you, our leaders of the professions, to consider naming the Foundation in your will, trust or estate plans. If you have already done so, please let us know so we can add your name to the Registry.

**2020 (Virtual) Honors Gala**

Our Honors Gala, the single largest annual event honoring members of the entire Osteopathic community, is also an important fundraising event for the Foundation. Even in a virtual format, we were able to honor and celebrate our shining stars within the profession last October. With our amazing host, Dr. Jennifer Caudle, special guest, Tracee Ellis Ross, Hollywood actress, singer, producer and director, and with an amazing Broadway extravaganza, the event was truly a memory maker. We are grateful for our fantastic sponsors and individual donors that helped to make the evening, in its re-imagined form, an incredible success.

We are well underway with plans for Honors 2021; which will be held on site in Phoenix, AZ, on Friday, October 22. The outpouring of support for the Gala has been tremendous and we look forward to hosting an incredible event. Recognizing our full Osteopathic family cannot attend in person, an online virtual experience will be available for those who would like to celebrate remotely.
Grants, Scholarships and Programs
The Foundation engages with hundreds of applicants and reviewers every year as part of its grants, scholarships, and awards programs. In anticipation of future growth, the AOF conducted a rigorous RFP process in search of a new software platform. At the conclusion, we migrated to a new platform (SurveyMonkey Apply), created FAQs for applicants, provided training for volunteer reviewers and just successfully completed our 2021 Spring Grant cycle.

In addition to running two concurrent systems to ensure the conclusion of 2020 Grant administration, distributing nearly two-hundred awards last year, we continued to build and expand strategic partnerships.

One such example is the Advocates for the American Osteopathic Association (AAOA) Holiday Hug Fund, launched in November 2020, that was established in partnership to provide small grants during the holiday season to students or residents whose families are facing financially challenging times.

Newly Launched Strategic Initiatives and Partnerships
- LGBTQIA+ Health Equity and Inclusion Initiative: Established in January 2021, the fund’s three-pronged platform includes scholarships for LGBTQIA+ students, continuing education programs for physicians, and a health care Fellowship that will be established later this year. On June 24th, in conjunction with Pride Month, we held a “Get Your Pride On” virtual happy hour to formally launch the initiative.
- Project Future: The AOF has been speaking to, and working with, Thought Leaders from across the country. Our next step is to convene these subject matter experts this fall to discuss relative, timely topics, with the goal to help cultivate a vision for the profession that includes education, practice, and research. An initial outcomes statement will be available to share at OMED.
- Scripps Research Institute: The AOF continues to partner with Scripps, one of the world’s top research institutions, on their national DETECT Study. The goal of the DETECT Study is to identify areas with viral outbreaks (COVID-19) through the use of fitness wearables, knowing that an early warning might give public health officials more time to take action. This year, we engaged the Mississippi Osteopathic Medical Association (MOMA), as our rural outreach partners. They, along with our network of physicians, industry benefactors, and affiliates, continue to engage and recruit audiences across the country in the DETECT study thus impacting this significant research.
**Student Osteopathic Medical Association Foundation (SOMA-F)**

On May 31st, after many months of discussion and planning, the SOMA Foundation dissolved its 501c3 structure and merged with the AOF. **While SOMA-F will maintain their name and remain a separate fund**, this strategic integration, sought out by their Governing Board, will position the SOMA Foundation for future growth and development, deepening mission impact while remaining student-serving and student-governed.

As the SOMA Foundation’s fiscal sponsor, we look forward to providing administrative support and strategic guidance so that it can focus on activities central to its mission – fundraising, governance, marketing, and grant distribution.

This student-led organization already possesses great compassion and are proving, once again, the future of the profession is in great hands!

**Communications**

We are growing our communications efforts to effectively share our work.

- Our new, interactive website will be launched this Quarter.
- We’ve created new, targeted e-communications, including our Deans’ Digest that provide up to date information. Other communications will be developed in the next 6-12 months.

As the Foundation reflects on where we are going, we look to you. You are in a unique position as leaders in the field to share your thoughts and vision. We welcome your ongoing input so that we may strengthen existing partnerships and create new ones that advance the tenants and philosophy of Osteopathic medicine.

On behalf of the entire Board and Staff of the American Osteopathic Foundation, I offer my heartfelt thanks for all you do on behalf of the Osteopathic profession. We look forward to continuing to work with the American Osteopathic Association toward a brighter collective future. #ShineOn

**Respectfully submitted,**

Jeffrey S. Grove, DO, FACOFP, dist.
ASSOCIATION OF OSTEOPATHIC STATE EXECUTIVE DIRECTORS

July 14, 2021
Written Report to the AOA Board of Trustees

It has been an honor and a privilege for me to serve as the Aosed President the last year and a half. I did not anticipate being in the position until July 2021 but with the unexpected diagnosis of Aosed President Pete Wertheim of a terminal illness I became the acting president in December of 2019. I was elected to the office in 2020. This past year and four months were a momentous one of change for the AOA, Aosed, the country and the world.

In July 2019, the AOA introduced Aosed to Kevin Klauer, DO, the new AOA CEO when he attended the Aosed Annual Meeting. Dr. Klauer has worked tirelessly since that time to bring together all of AOA’s constituents to make us stronger together than we are as individual organizations. This is not easy task as the prior AOA administration caused much angst and distrust between AOA, Aosed and other constituent organizations. The general belief, amongst the state affiliates was AOA did not care whether we flourished or withered on the vine. The way we saw it our interests were not viewed as important to the overall mission of the AOA.

Since taking over as CEO, Dr. Klauer has listened to Aosed, SOSE and its other constituent organizations. While he has made clear that he is willing to collaborate, listen, and try to reach solutions which are agreeable to all parties, he has also made clear the road forward depends on mutual trust and willingness to compromise. Overcoming years of distrust means demonstrating the need to communicate while being nimble.

As Aosed has experienced, it is not always easy to get across a clear message virtually. But Aosed has tried and during the pandemic has accomplished a lot for the state affiliates. Accomplishments include:

- Pivoting to CME delivery online
- Pivoting to online meetings including our Annual Meeting in July 2020 and our upcoming one on July 15, 2021
- Updating our online CME website TheCMECenter.org
- Membership and inclusion on AOA Bureaus, Committees and Councils with representation being greater than at any other time (thank you AOA and Aosed members!)
- Holding frequent Membership Zooms with Aosed’s affiliates
- Holding a virtual Aosed Executive Director’s Institute in 2020
- Participation in AOA’s Virtual OMED 2020
- Participation in the DO Day on the Hill in 2021 – which was opened to all affiliates
- Participation in the AOA House of Delegates in 2020

It is obvious that these accomplishments did not occur in a vacuum and are evidence of a greater improved working relationship between AOA staff and leadership and Aosed leadership and members. It has not always been easy but with persistence on the part of both organizations it was accomplished.
AOSED Written Report to the AOA Board of Trustees
July 14, 2021
Page 2

AOSED is embarking on the road to collaboration with AOA with a renewed purpose for all. AOSED’s accomplishments are the work of many dedicated state affiliate executive directors. Tomorrow I become the past president of AOSED and Diana Ewert, Pennsylvania Osteopathic Medical Association Executive Director becomes the AOSED President. She is uniquely qualified for the position by her knowledge, and work experience with both AOSED and AOA. I have confidence she will move AOSED to even greater accomplishments. She will have my support and the support of the AOSED Board of Trustees and membership.

I conclude my AOSED term with gratitude to the AOA staff, the AOA leadership and the AOSED leadership and membership for all we have accomplished together during these unprecedented times. Open lines of communication, collaboration and compromise make us *Stronger Together.*

The Osteopathic Profession is poised to rise to greater heights with us all working together to make it known why DOs are the best of all physicians. It will not be easy to do but I believe we can DO it and we will DO it. The Osteopathic Profession must hold fast to its philosophy and principles. The DO Difference is worth the work.

Thank you for allowing AOSED to fully participate in the process. Thank you for listening. Thank you for your consideration. It is what makes for a strong relationship.

With sincerest regards,

Vicki Whitaker
AOSED 2020-2021 President
The Osteopathic International Alliance (OIA) is the leading representative of the osteopathic profession worldwide, and advocates for high-quality osteopathic healthcare. As an “organization of organizations,” the OIA unifies osteopathic healthcare by connecting regulatory bodies, national professional organizations, schools, and regional, national, and multi-country groups. Currently, there are 72 OIA member organizations across five continents.

The global osteopathic profession comprises two related professions that share a common philosophy of healthcare: osteopathic physicians and osteopaths. The OIA envisions a world in which every person has access to high-quality osteopathic healthcare. *The mission of the OIA is to encourage systems of education and regulation that will ensure high standards for safe and effective healthcare provided by osteopaths and osteopathic physicians.*

**Relationship with the World Health Organization (WHO)**

In 2018, after 14 years of collaboration, the OIA was admitted into official relations with the WHO. In 2021, the WHO Executive Board at its 148th session voted to maintain the OIA’s official relations status.

The OIA and WHO jointly agreed on the following projects, the work of which has already begun:

1. A **global survey of osteopathy and osteopathic medicine**. This survey will be undertaken periodically to track the growth of osteopathy and osteopathic medicine. The most recent survey, the [OIA Global Review of Osteopathic Medicine and Osteopathy 2020](https://www.oialliance.org), is available on our website along with the [original 2013 survey](https://www.oialliance.org).

2. **Updating the Benchmarks for Training in Osteopathy**. Notably, this update will include both osteopathic medicine and osteopathy at the request of the WHO; and,

3. Developing an osteopathic-specific glossary of terms.

**Growth of the Global Osteopathic Professions**

The global osteopathic profession is rapidly growing. The number of osteopathic physicians has increased by 34% and the number of osteopaths by 84% since 2013. There are an estimated 200,000 clinicians delivering osteopathic healthcare worldwide in 46 countries.

The OIA 2020 survey of 46 countries identified 117,559 osteopathic physicians or physicians with additional training in osteopathy worldwide compared with 87,850
Most osteopathic physicians continue to be in the United States. There was also a 34% increase from the OIA 2013 Global Report which reported 82,500 registered US osteopathic physicians at that time.

Outside of the United States osteopathic physicians have a much lower representation compared with osteopaths. Germany reported 2,547 osteopathic physicians on their register - an 11% increase since 2013. Osteopathic physicians registered in France, however, increased significantly (56%) since 2013, reporting approximately 2,500 on their register in 2020. Russia reported in the region of 1,000 registered osteopathic physicians, a decrease of 23% from the data estimated in the 2013 Report. There was an increase in the last seven years from 20 to 30 registered osteopathic physicians in Canada, while the number in Italy remained much the same at 50.

### Table 4 Registered osteopathic physicians by country (c=circa / approximately)

<table>
<thead>
<tr>
<th>Country</th>
<th>2020 Registered Osteopathic Physicians</th>
<th>Compared with 2013 OIA Global Report</th>
<th>Difference compared with 2013 data (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>United States</td>
<td>110,700</td>
<td>82,500</td>
<td>+34</td>
</tr>
<tr>
<td>Germany</td>
<td>2547</td>
<td>2300</td>
<td>+11</td>
</tr>
<tr>
<td>France</td>
<td>2500</td>
<td>1600</td>
<td>+56</td>
</tr>
<tr>
<td>Russia</td>
<td>c1000</td>
<td>1300</td>
<td>-23</td>
</tr>
<tr>
<td>Italy</td>
<td>c50*</td>
<td>50</td>
<td>=</td>
</tr>
<tr>
<td>Canada</td>
<td>30</td>
<td>20</td>
<td>+50</td>
</tr>
<tr>
<td>Others</td>
<td>&gt;10</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>117,599</td>
<td>87,850</td>
<td>+34</td>
</tr>
</tbody>
</table>

The OIA 2020 survey identified 79,302 osteopaths worldwide compared with 43,000 recorded in the OIA 2013 Global Report, demonstrating a significant increase of 84% over the last seven years. Of these 45,093 are statutorily regulated and registered osteopaths and we estimate 34,207 osteopaths are not statutorily regulated and registered but may be registered with voluntary registering organizations. France had the greatest number of registered osteopaths by country in the world (33,000), followed by the United Kingdom (5,439). Italy, Spain, and Germany also yield high numbers of practitioners but have voluntary registration and regulation rather than statutory (13,600, 9,420 and 4,065 respectively). Australia, Canada, Portugal, and Switzerland have between 1,000 and 3,000 osteopaths and a further eight countries have between 300 and 1,000 osteopaths on their registers.

Submitted by: Ms. Ana Paula A. Ferreira, Chair

---

1 All numbers in the 2013 and 2020 reports are self-reported.
2 It is important to note that osteopathic physicians outside the United States are usually MDs educated and trained according to that country’s system, who have subsequently completed post-doctoral training in osteopathy, rather than US-trained and educated osteopathic physicians.
To: President, Thomas Ely, DO  
President-Elect, Joseph Giaimo, DO  
AOA CEO, Kevin Klauer, DO, EJD  
AOA Board of Trustees, American Osteopathic Association

From: Sherri Quarles, Executive Director and the President of SOSE  
Society of Osteopathic Specialty Executives

Thank you for the opportunity to submit a written report on behalf of SOSE.

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

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

SOSE memberships have held up during the pandemic and dues are coming in. We are also trying to recruit four additional specialty colleges who have not been members.

One of the biggest challenges has been trying to understand the new process for Accreditation Requirements for Category 1 CME Sponsors, moving from a 3-year cycle to open reporting. Clarifying the term of Osteopathic Distinctive CME, what will that definition be. We would like to say thank you to CEO, Kevin Klauer, DO, EJD, and Nicole G. Blankenship, MBA, CAE, Vice President, Affiliate Relations, who have continued to keep the lines of communication open and allow for the additional meeting to help clarify issues. Even though we may not always agree, the opportunity to discuss issues is of great importance. I know that we will come to a workable solution for the good of the osteopathic family.

One of the underlying statements that continues to be a part of our conversations is: is it important for the AOA to have input from the Specialty Colleges regarding policies, conferences, and other offerings that affect our organizations? The answer to that is yes, and we look forward to the new appointments for the upcoming year that will allow our members to participate in the following AOA Bureaus, Council & Committees:
SOSE was pleased that the Bob E. Jones, CAE Award was reinstated and we look forward to the presentation of the winners that will be mentioned at the AOA House of Delegates.

We are very appreciating that you are working with us and being more transparent in your action. That allows us to work toward a common goal for our osteopathic family.

Thank you for the collaborative work on the affiliation agreement, and a special thank you to Nicole Blankenship, who tirelessly works with us.

The Society for Osteopathic Specialty Executives (SOSE) has been sharing ideas on virtual meetings and lessons learned. They have also shared research on vendors for virtual meetings including features and costs. Most recently the conversations have evolved to hybrid meetings and feasibilities, especially for smaller specialty colleges.

We still have challenges that we are facing:

Membership Retention (slower to renew due to the loss of income) (many of our members were furloughed and out of work for months) and Membership Recruitment, Education Offerings, and continuing to look for ways to assist our members through the difficult times we are facing in this Pandemic. Working from home to canceling meetings or revamping our style of meetings.

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

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

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

Respectfully Submitted:
Society for Osteopathic Specialty Executives (SOSE) Board

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