

2019

**Annual Report**

OKLAHOMA OSTEOPATHIC ASSOCIATION

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# Standing Rules of Convention

The Standing Rules of Convention were adopted March 9, 1971, by the Board of Trustees, and are as follows:

Special Committees serving the annual business meeting shall be appointed by the president as follows:

(a)	Committee on Credentials	Three Members
(b)	Committee on Resolutions	Three Members
(c)	Tellers	Three or More Members
(d)	Sergeant-at-Arms	One Member

At the opening of the business meeting or as soon thereafter as possible, the Committee on Credentials shall report the number of members registered and eligible to vote.

- (1) A member wishing the floor must rise, address the chair and give his or her name and town so that it may be recorded in the minutes.
- (2) Debate on any one motion or subject shall be limited to three minutes to each speaker. No person shall speak on the same subject more than once until all have spoken who wish to do so. No person shall speak on the same subject more than twice, except by a majority vote of the members present.
- (3) All resolutions, except those contained in the reports of Officers, the Executive Board and Committees, shall be in writing and shall be signed by two voting members.
- (4) Motions of more than a few words shall be written, signed and sent to the presiding officer when made.

# 2019 Annual Business Meeting Agenda

1. Call to order – Christopher A. Shearer, DO
2. Invocation – Timothy J. Moser, DO
3. Pledge of Allegiance – Kenneth E. Calabrese, DO
4. Appointment of Special Committees – Christopher A. Shearer, DO
  - Committee on Credentials (3)
  - Committee on Resolutions (3)
  - Tellers (3+)
  - Sergeant-At-Arms (1)
5. Introduction of National Dignitaries – Christopher A. Shearer, DO
6. Memorial Service – Christopher A. Shearer, DO
7. Presentation of Life Memberships – Christopher A. Shearer, DO
8. 2018 Annual Audit – Dr. Shearer; Barbara Henry, CPA
9. Presentation of 2018 Annual Business Meeting Minutes – Christopher A. Shearer, DO
10. Reports from Bureaus & Committees

## DEPARTMENT OF PROFESSIONAL AFFAIRS

Chief: Timothy J. Moser, DO  
President-Elect

### **Bureau on Awards**

Bret S. Langerman, DO, chair

### **Bureau on Membership**

Rebecca D. Lewis, DO, chair

### **Bureau on Continuing Medical Education**

Timothy J. Moser, DO, chair

### **Bureau on Constitution & Bylaws**

Richard W. Schafer, DO, chair

### **Bureau on Postgraduate Education**

Jason L. Hill, DO, chair

### **Bureau of New Physicians**

Clayton H. Royder, DO, chair

### **Bureau on Residents**

Christopher A. Shearer, DO, chair

## DEPARTMENT OF PUBLIC AFFAIRS

Chief: Richard W. Schafer, DO  
Vice President

### **Bureau on Legislation**

LeRoy E. Young, DO, chair

## DEPARTMENT OF BUSINESS AFFAIRS

Chief: Kenneth E. Calabrese, DO  
Past President

### **Bureau on Finance**

Timothy J. Moser, DO, chair

### **Bureau on Member Services**

Timothy J. Moser, DO, vice chair

### **Bureau on Convention**

Timothy J. Moser, DO, chair

### **District Presidents' Council**

Timothy J. Moser, DO, vice chair

### **Past Presidents' Council**

Gabriel M. Pitman, DO, chair

11. Supplemental Reports
  - OEFO: Jeffery L. Shipman, DO, president
  - OEFO Nominating Report – Jeffrey L. Shipman, DO, president
12. Election of OEFO Officers and Trustees – Christopher A. Shearer, DO
  - OOPAC Committee: LeRoy E. Young, DO, chair
  - OSU-CHS & OSU-COM: Kayse M. Shrum, DO, OSU-CHS president & OSU-COM dean
  - Oklahoma Osteopathic Board of Examiners: LeRoy E. Young, OSBOE president
  - Reports from members serving in elected government, federal or statewide positions
13. Presentation of the OOA Nominating Committee Report – Bret S. Langerman, DO, chair
14. Election of Officers and Trustees – Christopher A. Shearer, DO
15. Old Business
16. New Business – Amendments to Constitution and Bylaws
17. Adjournment

# 2018 Annual Business Meeting Minutes

2018 Annual Business Meeting of the Oklahoma Osteopathic Association  
Hyatt Regency Tulsa Hotel  
Tulsa, Oklahoma  
April 28, 2018

## Call to Order

Kenneth E. Calabrese, DO, MACOI, President of the Oklahoma Osteopathic Association (OOA), welcomed all in attendance and called the meeting to order on April 26, 2018 at 2:00pm.

## Invocation

Christopher A. Shearer, DO, provided the invocation.

## Pledge of Allegiance

Kenneth E. Calabrese, DO, then led the physicians in the Pledge of Allegiance.

## Appointment of Special Committees

President Calabrese appointed the following committees and individuals:  
Credentials Committee: Jason L. Hill, DO; Layne E. Subera, DO; and William J. Pettit, DO  
Resolutions Committee: Bret S. Langerman, DO; Trudy J. Milner, DO; and Timothy J. Moser, DO  
Tellers: C. Michael Ogle, DO; Michael K. Cooper, DO; and Duane G. Koehler, DO  
Sergeant-at-Arms: LeRoy E. Young, DO  
Parliamentarian: N/A

## Introduction of Guests and National Dignitaries

Dr. Calabrese then introduced the following dignitaries and thanked them for coming:  
Duane G. Koehler, DO President of the American College of Osteopathic Family Physicians and his wife Tammie L. Koehler, DO; Trudy J. Milner, DO, OSU Board of Regents (first DO appointed); C. Michael Ogle, DO, member of the AOA Board of Trustees; and Kayse M. Shrum, DO, outgoing OOA Board member and President/Dean of OSU College of Osteopathic Medicine (first female appointed).

## Memorial Service

Music played as the names were read aloud of osteopathic physicians who have passed on since the last annual convention. They include:

Thomas A. Jones, DO  
Michael R. Davis, DO  
Beverly J. Mathis, DO, FACOI  
Emery L. Suderman, DO  
Robert R. Merwick, DO  
William E. Moore, DO

Kim D. Floyd, DO, FACOP  
Wesley M. Ingram, DO  
David R. Hooks, DO  
Donald J. Krpan, DO, FACOFP  
Geron W. Meeks, DO

Dr. Calabrese then asked for a moment of silence in their memory and thanked them for their contribution to the osteopathic profession.

## Presentation of Life Membership Awards

The Life Membership Awards go to osteopathic physicians who have been consecutively dedicated members of the OOA for 25 years and at least 70 years of age. They are as follows:

D. Paul Campbell, DO (Tulsa)	Gary L. Patzkowsky, DO (Enid)
Gary M. Freeman, DO (Tulsa)	Theodore. W. Pollock, DO (Tulsa)
Dean R. Fullingim, DO (Tulsa)	Michael E. Salrin, DO (Oklahoma City)
J. Steve Grigsby, DO (Miami)	Gerard F. Shea, DO (Pawhuska)
James W. Hogin, DO (Oklahoma City)	George S. Stenger, DO (Okeene)
C. Michael Johnson, DO (Claremore)	Ronald S. Stevens, DO (Muskogee)
Rodney O. McCrory, DO (Norman)	Bob L. Weeks, DO (Edmond)
Gregory J. McWilliams, DO (Tahlequah)	
Charles R. Mettry, DO (Ada)	

## Presentation of the OOA's 2017 Annual Audit

Dr. Calabrese called upon Barbara Henry, CPA, to present the Annual Audit Report for the year ending October 31, 2017. Ms. Henry thanked the board and staff for their cooperation. She directed members to turn to page 12, the independent auditor's report. She gave an unqualified/clean opinion. She then read directly from the Independent Auditor's Report: "In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of Oklahoma Osteopathic Association, Inc., as of October 31, 2017, and the changes in its net assets and its cash flows for the year then ended in accordance with accounting principles generally accepted in the United States of America."

Ms. Henry complimented the OOA's outside CPA, Peter Terranova and the OOA staff. She said she looks at the items requested and audit of internal control, which she does not offer an opinion. She then complimented the OOA staff for their work on handling the control of financial documents. She then directed everyone to page 13, Statement of Financial Position. Ms. Henry brought three things to the audiences' attention: restricted funds, total current assets and the change to the restricted/unrestricted/permanent restricted/temporary restricted assets (no longer needed). Ms. Henry complimented the OOA staff and Board for the decrease of expenses and increase in assets. She informed members that the technology expenses will go away at the end of 2018 allowing a \$21,000 decrease in expenses, page 15.

Ms. Henry then directed everyone to page 21 to review the Subsequent Events and Going Concern.

1. Subsequent Events "The Association has evaluated events through March 30, 2018, the date on which the financial statements were available to be issued. There are no subsequent events to be reported."
2. Going Concern "The Association relies on membership dues and advertisements to support its operations. It has sufficient investments to cover current operating losses."

This concluded her report.

## Presentation of the OOA's 2017 Annual Business Meeting Minutes

Dr. Calabrese asked membership to review the minutes from the last annual meeting, which can be found on pages 5-9.

**Dr. Moser made a motion to approve the minutes of the 2017 annual meeting. Dr. Schafer seconded. Approved unanimously.**

## Reports from Bureaus and Committees

Dr. Calabrese moved on to reports from bureaus and committees. He started with the Department of Professional Affairs:

**Bureau on Awards:** Dr. Subera stated the bureau met and the awards will be given out throughout the course of the convention.

**Bureau on Membership:** Clayton H. Royder, DO, announced the bureau has met 10 times this year and the report is on page 33. This report is informational in nature and brings no resolutions.

**Bureau on Continuing Medical Education:** Timothy J. Moser, DO, announced the bureau report is on page 33. This report is informational in nature and brings no resolutions.

**Bureau on Constitution & Bylaws:** Dr. Shearer announced the report is on page 34 (and informational) and requested a table until the scheduled time on the business meeting agenda. The bureau recommends changes as follows:

1. Under Article VI, Section 1 (Board of Trustees): The Board of Trustees of this Association shall consist of the President, President-Elect, Immediate Past President, Vice President, and ~~eight (8)~~ nine (9) other members who shall be elected Trustees. Two (2) Trustees shall be elected annually by the Association to serve terms of three (3) years each, and ~~two (2)~~ three (3) Trustees shall be elected annually by the Association to serve terms of one (1) year each. One (1) of the one year Trustees shall be a non-voting resident Trustee. Vacancies will be filled as provided in the Bylaws. The Board shall be the administrative and executive body of the Association and perform such other duties as are provided in the Bylaws.

Dr. Pitman requested all motions be made during New Business.

2. Under Article II, Section 2 (Dues Rates): (a) Regular members: The first year in practice the dues shall be \$300. The second year in practice the dues shall be \$400. The third and subsequent years shall be \$5600 per year.
3. Under Article II, Section 2(Dues Rates): ~~Dues shall not be waived for regular members who elect to be in the uniformed services of the Federal Government unless they are in an approved postdoctoral training program.~~ Dues shall be waived \$100 for those regular members who ~~have been~~ are drafted into active duty with the USA military ~~armed forces~~ during the term of ~~such~~ their service.

**Bureau on Postgraduate Education:** Kayse M. Shrum, DO, announced the report is on page 34 and is informational in nature only and no resolutions presented.

**Bureau on New Physicians, Residents, and Students:** Dr. Bushman said the bureau met once this year and the report is on page 35. He said this report is informational in nature only and no resolutions were brought forth.

The Chief of the Department of Public Affairs was unavailable to be present, Dr. Pitman called upon those bureaus.

**Bureau on Legislation:** Dr. Young announced the report on page 36-38. He said the bureau has tracked 143 bills, some are very significant bills (which have passed). Dr. Young said he will go into detail with some of those bills later in the evening at the Bureau on Legislation meeting. One bill in particular, SB1446 (opioid bill on the amount allowed to prescribe) is sitting on the Governor's desk at this very moment. He said with this bill, Proper Prescribing will be every year instead of every other year and will require a topic of Proper Prescribing, Opioids, or Addiction. It will be under the licensure board to facilitate.

**Bureau on Public Awareness (Ad Hoc):** Dr. Hill reported saying the bureau met multiple times this year and no resolutions are being presented.

Dr. Calabrese then asked the Department of Business Affairs to present their bureaus.

**Bureau on Finance:** Dr. Shrum stated the Bureau on Finance met nine times this year and the report is on page 39. She said this report is informational in nature only and there are no resolutions presented at this time.

**Bureau on Member Services:** Dr. Schafer said the bureau met twice this year and voted Central National Bank as a recommended company and Oklahoma City University's Meinders School of Business as a partnership. The report is located on page 39.

**Bureau on Convention:** Dr. Shearer stated the bureau met several times to ensure the success of the convention. The report is on page 39 and is informational only. He thanked Ms. Ivy and staff for their hard work.

**District Presidents' Council:** Dr. Moser stated the council met jointly with the Past Presidents Council at the 2018 Winter CME Seminar in Catoosa. He reported the staff personally visited eight districts. The report is on page 39 and 40 and is informational and no resolutions were presented.

**Past Presidents' Council:** Dr. Ogle reported the council met in January, in conjunction with the District Presidents' Council at the 2018 Winter CME Seminar. They mainly spoke about legislation and budget issues across the state. The report is on page 40 and there are no resolutions to report.

## Presentation of Nominating Committee Report

Dr. Calabrese called upon Dr. Carter to present the Nomination Committee report.

Dr. Carter reported the committee met in January. The committee recommends the following for consideration

President: Christopher A. Shearer, DO  
President-Elect (Becomes President): Dale Derby, DO  
Vice President (One-Year Term): Timothy J. Moser, DO  
Trustee One-Year Term ending 2019: Jonathan B. Stone, DO  
Trustee One-Year Term ending 2019: Robin R. Dyer, DO  
Trustee Three-Year Term ending 2021: Jason L. Hill, DO  
Trustee Three-Year Term ending 2021: Jonathan K. Bushman, DO  
Resident Trustee: Christopher Trinh, DO  
Trustee Three-Year Term ending 2020: Monica M. Woodall, DO (replaces Dr. Moser's unexpired term)  
Trustee Three-Year Term ending in 2019: Rebecca D. Lewis, DO (replaces Dr. Derby's unexpired term)

A motion was made to approve the 2018 OOA Board of Trustee nominations. Motion approved unanimously.

Dr. Carter reported the list for the following had been recommended to serve at the 2018 AOA House of Delegates. They are as follows:

### Delegates

1. Christopher A. Shearer, DO
2. C. Michael Ogle, DO
3. Gabriel M. Pitman, DO
4. David F. Hitzeman, DO
5. Layne E. Subera, DO
6. Joseph R. Schlecht, DO
7. Dennis J. Carter, DO
8. LeRoy E. Young, DO
9. Kayse M. Shrum, DO
10. Bret S. Langerman, DO
11. Timothy J. Moser, DO
12. Dale Derby, DO
13. Jason L. Hill, DO
14. Clayton H. Royder, DO
15. Jonathan K. Bushman, DO
16. Brooke Cloud – Student Delegate

### Alternate Delegates

1. Thomas J. Carlile, DO
2. Richard W. Schafer, DO
3. Monica M. Woodall, DO
4. Rebecca D. Lewis, DO
5. William J. Pettit, DO
6. Tammie L. Koehler, DO
7. Kenneth E. Calabrese, DO
8. Trudy J. Milner, DO
9. Trevor Bickford – Alternate Student Delegate

Ballots were distributed amongst the OOA members for the 2018 House of Delegates vote.



## Supplemental Reports

Dr. Calabrese then moved on to supplemental reports.

OEFOM Board of Trustees: Dr. Shrum reported on the Oklahoma Educational Foundation for Osteopathic Medicine and stated the report is on page 22. She presented the 2018-2019 OEFOM Board of Trustee nominations:

President: Jeffrey L. Shipman, DO

President-Elect: Kayse M. Shrum, DO

Vice President: J. David Ogle, JD

Secretary/Treasurer: Lana G. Ivy, MBA, CFRE

Past President/Trustee: Gabriel M. Pitman, DO

Trustee: Marsh Pitman

Trustee: LeRoy E. Young, DO, FAOCOPM dist.

Trustee (OOA President): Christopher A. Shearer, DO, FACOI

Trustee (OOA President-Elect): Dale Derby, DO

Trustee (OOA Vice President): Timothy J. Moser, DO, FACOFP

A motion was made to approve the 2019 OEFOM Board of Trustee nominations. Motion approved unanimously

OOPAC Committee: Dr. Young stated the report for the Oklahoma Osteopathic Political Action Committee is on pages 25. He said the OOPAC raised more than \$34,000. He informed the members that 65 members donated which comes to 6% of the OOA members and 2.4% of Oklahoma osteopathic physicians.

Dr. Shrum announced the report for OSU-CHS is on pages 27-32. She said there are too many updates to OSU-CHS to share but encouraged members to come and visit the campus.

Dr. Young announced the Oklahoma State Board of Osteopathic Examiners report is on pages 23. He said Dr. Langerman joined OSBOE, replacing Gordon P. Laird, DO. He said there's roughly 2,400 licensed physicians in the state of Oklahoma. He reiterated to the members regarding the annual one-hour Proper Prescribing change and that the Board doesn't come looking for offenders, they investigate when there's a complaint lodged with the Board.

Dr. Calabrese recognized State Representatives Dale Derby, DO and J. Michael Ritze, DO for their efforts while serving in government positions. He also recognized Layne E. Subera, DO for serving as a director of the Oklahoma Bureau on Narcotics and Dangerous Drugs and an appointee on the Oklahoma Opioid Commission.

Dr. Calabrese announced the members voted unanimously to approve the House of Delegates nominations.

### **Old Business**

There being no old business, Dr. Calabrese then moved to new business.

### **New Business**

Dr. Calabrese revisited the four amendments to the Constitution & Bylaws. He reread the amendments found on page 34:

#### **Proposed Amendment 1: OOA Constitution, Article III, Section II**

Section 2. Such local or district societies shall be chartered by the Board of Trustees of the Oklahoma Osteopathic Association, provided at least two thirds of the members of said local or district society are members in good standing of the Oklahoma Osteopathic Association and may be a member of the American Osteopathic Association.

#### **Proposed Amendment 2: OOA Bylaws Article IV, Section 1**

Membership in the Oklahoma Osteopathic Association, ~~the American Osteopathic Association~~ and his or her district society shall be a requisite for qualification for any officer or for any member of any department, division, bureau, or committee of the Association, however selected, if the candidate is a Doctor of Osteopathy or Doctor of Osteopathic Medicine.

### **Proposed Amendment 3: OOA Constitution, Article III. Component Societies**

Section 1. This Association shall be a federation of district societies organized within the State of Oklahoma whose boundaries shall be determined by the Board of Trustees and such other auxiliary organizations as shall be authorized by the Board of Trustees.

Section 2. Such local or district societies shall be chartered by the Board of Trustees of the Oklahoma Osteopathic Association, provided ~~at least two thirds of the members of said local or district society are~~ members are in good standing of the Oklahoma Osteopathic Association and (may be a member) of the American Osteopathic Association.

### **Proposed Amendment 4: OOA Bylaws, Article IV. Elections**

Section 4. American Osteopathic Association House of Delegates

The delegates representing the Oklahoma Osteopathic Association to the House of Delegates of the American Osteopathic Association must be members of their district, state, and national associations. A majority of each delegate's employment activity must be in the state of Oklahoma, unless retired or the OOA Board of Trustees waives this requirement prior to the Nominating Committee meeting. Two of such delegates shall be the current President and President-Elect at the time of the American Osteopathic Association House of Delegates, who shall serve as the Chairman and Vice-Chairman of the Delegation. The remaining such delegates shall be nominated by the Nominating Committee or by nominations from the floor. All elections shall be by ballot. This election shall take place at the regular business meeting of the annual session of the Association and they shall serve for one (1) year, or until their successors are elected. The delegation will then meet to elect their Chief Delegate by ballot vote.

Dr. Calabrese opened the floor to discuss the proposed amendments.

Ballots were distributed amongst the OOA members for the proposed amendments.

While the votes are being tallied, Dr. Calabrese asked Dr. Young to further discuss the Nurse Practitioner Bill (SB570).

Dr. Young informed the members that Senator AJ Griffin took a Cosmetology Bill, stripped out the details, added the Nurse Practitioner Bill details, and submitted it to the Senate. If passed, it will be sent back to the House. If this bill passes entirely, Nurse Practitioners will have the ability to prescribe opioids and be considered family practitioners. Dr. Young encouraged members to contact their legislators to oppose this bill.

Dr. Young opened the floor for questions.

Dr. Keith Russell asked for an understanding as to why nurse practitioners are receiving "super star" status.

Dr. Young said through their Political Action Committee and telling legislators that they will be moving to the rural areas.

Ms. Ivy said members should have received an action alert a couple hours prior on ways to contact their legislators with talking points.

**Dr. Calabrese announced the members voted unanimously to approve the OOA Constitution & Bylaws amendments.**

Dr. Calabrese adjourned the meeting at 3:04pm.

# Annual Audit Report

## Oklahoma Osteopathic Association, Inc.

Audit Report  
on  
Financial Statements  
for Fiscal Year Ending  
Oct. 31, 2018

Issued  
March 27, 2019

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**INDEPENDENT AUDITOR'S REPORT**

To the Board of Trustees of  
Oklahoma Osteopathic Association, Inc.  
Oklahoma City, OK

We have audited the accompanying financial statements of Oklahoma Osteopathic Association, Inc. (an Oklahoma nonprofit organization), which comprise the statement of financial position as of October 31, 2018, and the related statements of activities, functional expenses, and cash flows for the year then ended, and the related notes to the financial statements.

**Management's Responsibility for the Financial Statements**

Management is responsible for the preparation and fair presentation of these financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

**Auditor's Responsibility**

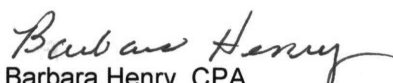
Our responsibility is to express an opinion on these financial statements based on our audit. We conducted our audit in accordance with auditing standards generally accepted in the United States of America. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditor's judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

**Opinion**

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of Oklahoma Osteopathic Association, Inc. as of October 31, 2018, and the changes in its net assets and its cash flows for the year then ended in accordance with accounting principles generally accepted in the United States of America.

  
Barbara Henry, CPA  
Oklahoma City, Oklahoma  
March 27, 2019

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**OKLAHOMA OSTEOPATHIC ASSOCIATION  
STATEMENT OF FINANCIAL POSITION  
FOR THE FISCAL YEAR ENDED OCTOBER 31, 2018**

	10/31/2017 (MEMO ONLY)	10/31/2016 (MEMO ONLY)
<b>ASSETS</b>		
Current Assets:		
Cash and Cash Equivalents	344,322	319,706
Investments-Wachovia	290,929	268,258
Other Current Assets	59,004	5,017
Prepaid Expenses and Deposits	0	4,803
Total Current Assets	<u>694,255</u>	<u>597,784</u>
Property and Equipment		
Equipment	107,793	107,793
Less: Accumulated Depreciation	<u>(93,527)</u>	<u>(84,220)</u>
Total Property and Equipment	<u>14,266</u>	<u>23,572</u>
Restricted Assets		
Restricted Cash	50,156	49,994
Note Receivable-Physicians Health	2,750	2,750
Total Restricted Assets	<u>52,906</u>	<u>52,744</u>
<b>TOTAL ASSETS</b>	<u><u>761,427</u></u>	<u><u>674,100</u></u>
<b>LIABILITIES AND NET ASSETS</b>		
Current LIABILITIES		
Accounts Payable	66,113	636
Accrued Liabilities	0	0
Total Current Liabilities	<u>66,113</u>	<u>636</u>
LONG-TERM LIABILITIES		
Dues Collected in Advance	369,285	353,350
Advance CME Meetings Income	0	2,520
Advance Convention Income	0	0
Advance Journal and Directory	0	0
Total Other Liabilities	<u>369,285</u>	<u>355,870</u>
<b>TOTAL LIABILITIES</b>	<u><u>435,398</u></u>	<u><u>356,506</u></u>
<b>NET ASSETS</b>		
Unrestricted	273,123	264,851
Donor Restricted Net Assets	0	0
Board Restricted Net Assets	52,905	52,743
Total Net Assets	<u>326,028</u>	<u>317,594</u>
<b>TOTAL LIABILITIES AND NET ASSETS</b>	<u><u>761,427</u></u>	<u><u>674,100</u></u>

**OKLAHOMA OSTEOPATHIC ASSOCIATION  
STATEMENT OF ACTIVITIES  
FOR THE FISCAL YEAR ENDED OCTOBER 31, 2018**

	<u>Unrestricted</u>	<u>Restricted</u>	<u>Total</u>	<u>Total 10/31/2017 (MEMO ONLY)</u>	<u>Total 10/31/2016 (MEMO ONLY)</u>
<b><u>REVENUES AND OTHER SUPPORT</u></b>					
Membership Dues	\$ 574,210		574,210	514,572	523,722
Membership Revenue	375		375	0	0
CME Meetings	171,017		171,017	169,059	147,280
CME - Online	22,338		22,338	0	0
Consortium	205		205	0	0
Journal Advertisement	2,610		2,610	10,235	12,860
Directory Advertisement	550		550	1,980	2,965
Website Advertisement/All Other	3,600		3,600	1,046	3,149
Directory Sales	237		237	212	6,218
OEFOM	55,212		55,212	55,819	56,060
Copier	190		190	145	0
Interest Income	617		617	20	1,511
Interest Income - Recovery Fund	545		545	253	122
Royalty Income/Insurance Advertising	61,238		61,238	73,253	76,012
Convention Income	293,629		293,629	308,728	328,106
Miscellaneous Income	594		594	346	150
Special Project Income- SOPP Grant	0		0	0	0
Board of Examiners Rent	15,962		15,962	16,802	15,992
CME Workshop Income	0		0	1,215	1,710
Unrealized Gains (Losses)	861		861	35,085	13,678
<b>Total Revenues and Other Support</b>	<b>\$ 1,203,990</b>	<b>0</b>	<b>1,203,990</b>	<b>1,188,770</b>	<b>1,189,535</b>
<b><u>EXPENSES</u></b>					
<u>Program Services:</u>					
Operating Expenses	1,078,082		1,078,082	1,163,836	11,621,138
Physicians Health Fund	16,500		16,500	16,500	16,500
<b>Total Program Expenses</b>	<b>\$ 1,094,582</b>	<b>0</b>	<b>1,094,582</b>	<b>1,180,336</b>	<b>1,178,638</b>
Change in Net Assets	\$ 109,408		109,408	8,434	10,897
<b>Net Assets, October 31, 2017</b>	<b>\$ 326,028</b>		<b>326,028</b>		
<b>Net Assets, October 31, 2018</b>	<b>\$ 435,436</b>		<b>435,436</b>	<b>326,028</b>	<b>317,594</b>
				<b>2,017</b>	<b>2,016</b>

**OKLAHOMA OSTEOPATHIC ASSOCIATION  
STATEMENT OF FUNCTIONAL EXPENSES  
FOR THE FISCAL YEAR ENDED OCTOBER 31, 2018**

	<b>TOTAL PROGRAM 10/31/2018</b>	<b>TOTAL 10/31/2017 (MEMO ONLY)</b>	<b>TOTAL 10/31/2016 (MEMO ONLY)</b>
Office Salaries	326,146	335,076	343,450
Payroll Taxes	27,224	27,910	24,845
Group Insurance	47,434	44,542	42,951
Office Expense	9,185	14,539	11,295
Credit Card Expense	24,483	21,213	23,938
Technology Expenses	23,678	20,842	16,766
Telephone	11,457	10,435	9,754
Postage	8,186	9,517	9,391
Mailing Machine Expense	6,445	3,516	2,672
Copier/Printers Lease	16,952	15,322	13,966
Dues and Subscriptions	4,475	6,493	5,825
Journal Costs	10,618	13,517	10,218
Directory Costs	9,151	8,786	0
AOA Official Travel	17,788	25,182	32,217
Delegates	7,500	7,000	2,664
CME Meetings Expense	47,922	64,453	49,433
Public Relations-Legislative	7,826	6,978	9,375
Public Relations-Meeting Expense	21,325	27,480	25,058
Public Relations-District Meeting Expense	2,092	2,001	830
Public Relations-Flowers	431	766	536
Public Relations-Advertising	0	1,708	1,510
Public Relations-Post Graduate Education	4,826	(1,500)	0
Public Relations-Board Retreat	0	3,000	0
Legal and Accounting	24,275	26,769	16,640
Advalorem Taxes	379	479	580
Outsource Expense	2,516	1,015	1,773
Convention Expense	146,135	167,936	197,412
Special Project Expense	0	4,380	378
Interest Expense	0	190	0
Miscellaneous Expense - Unbudgeted Expense	500	0	1,377
Building Expenses	22,734	26,161	26,878
Physicians Health Fund	16,000	16,500	16,500
Furniture Lease Expense	18,000	18,000	18,000
Building Lease Expense	39,463	37,788	37,788
Utilities	14,835	12,176	11,296
OSU-COM Expense	4,815	24,921	29,565
OOA Sponsorship	4,862	2,500	0
Employee Pension Plan	38,049	48,042	53,549
Membership Promotion	(131)	0	0
Professional Development	0	0	399
Mayo Inaugural Fund	1,000	0	0
Auto Lease	0	0	76
Auto Lease	0	0	4,741
Contract Lobby	118,150	115,397	115,600
<b>Total Expenses Before Depreciation</b>	<b>1,086,726</b>	<b>1,171,030</b>	<b>1,169,246</b>
Depreciation	7,855	9,306	9,392
<b>Total Expenses Per Program</b>	<b>1,094,581</b>	<b>1,180,336</b>	<b>1,178,638</b>



**OKLAHOMA OSTEOPATHIC ASSOCIATION  
STATEMENT OF CASH FLOW  
FOR THE FISCAL YEAR ENDED OCTOBER 31, 2018**

<b>CASH FLOWS FROM OPERATING ACTIVITIES:</b>	
Change in net assets	\$ 109,408
<b>Adjustments to reconcile changes in net assets to net cash provided by operating activities:</b>	
Depreciation	7,855
Other Assets	2,742
Payables - Increase	(2,541)
Prepaid Expenses - Decrease	<u>(1,750)</u>
Total adjustments	<u>6,306</u>
<b>NET CASH PROVIDED BY OPERATING ACTIVITIES</b>	<b>115,714</b>
<b>CASH FLOWS FROM INVESTING ACTIVITIES:</b>	
Capital Expenditures	(1,595)
<b>NET CASH PROVIDED BY (USED IN) INVESTING ACTIVITIES</b>	<b>(1,595)</b>
<b>CASH FLOWS FROM FINANCING ACTIVITIES:</b>	
Net change	<u>(98,014)</u>
<b>NET CASH PROVIDED BY FINANCING ACTIVITIES</b>	<b>(98,014)</b>
<b>INCREASE IN CASH AND CASH EQUIVALENTS</b>	<b>16,105</b>
<b>CASH AND CASH EQUIVALENTS, October 31, 2017</b>	<b><u>344,322</u></b>
<b>CASH AND CASH EQUIVALENTS, October 31, 2018</b>	<b><u>\$ 360,427</u></b>

OKLAHOMA OSTEOPATHIC ASSOCIATION  
Notes to Financial Statements  
For Fiscal Year Ended October 31, 2018

Summary of Significant Accounting Policies

**Organization**

Oklahoma Osteopathic Association is a not-for-profit organization whose mission is to provide members with the resources, information, and leadership which enables them to provide medical services in an effective professional manner. The organization strives to improve the quality of Osteopathic medical care through an effective continuing medical education program.

The staff of the Association is dedicated to promoting the purpose of the organization. They provide an exceptional environment for success.

**Basis of Accounting**

The financial statements of the Association have been prepared on the accrual basis of accounting and accordingly reflect all significant receivables, payables and other liabilities. Net assets and revenues, expenses, gains and losses are classified based on the existence or absence of donor-imposed restrictions.

The Association reports information regarding its financial position and activities according to SFAS No. 117 which requires an organization to report information regarding its financial position and activities according to three classes of net assets: unrestricted net assets, temporarily restricted net assets, and permanently restricted net assets.

**Use of Estimates**

The preparation of financial statements in conformity with accounting principles generally accepted in the United States of America requires managements to make estimates and assumptions that affect the reported amounts of assets and liabilities and disclosure of contingent assets and liabilities at the date of the financial statements and the reported amounts of revenues, expenses, gains, losses and other changes in net assets during the reporting period. Actual results could differ from those estimates.

**Support and Expenses**

Revenue is primarily derived from membership dues, convention revenue, and from providing continuing medical education programs. The organization uses the accrual basis of accounting for recording support and revenues, recording revenues when billed, and recording expenses when incurred.

### Accounts Receivable

Accounts receivable net of the allowance for uncollectible accounts is for services rendered at the amount billed under contract. Accounts are considered delinquent and subsequently written off as bad debts based on individual credit evaluation and specific circumstances of the account.

### Investments and Investment Returns

Investments consist of mutual funds, certificates of deposit and equities and are carried at fair value, determined by quoted market price. Investment return includes dividend, interest and other investment income, realized and unrealized gains and losses on investments carried at fair value and realized gains and losses on other investments. Investment return that is initially restricted by donor stipulation and for which the restriction will be satisfied in the same year is included in unrestricted net assets. Other investment return is reflected in the statements of activities as unrestricted or temporarily restricted based upon the existence and nature of any donor or legally imposed restrictions.

### Property and Equipment

The Association capitalizes expenditures for property and equipment and carries the assets at cost of acquisition. Donated property and equipment are carried at fair value at the date of donation. The Association provides for depreciation by use of the straight-line basis over the estimated useful lives of assets—five years for equipment.

Office Equipment	\$107,793
Less: Accumulated Depreciation-10/31/18	<u>(101,382)</u>
Total Book Value -10/31/18	<u>\$ 6,411</u>

### Contributions

All contributions are considered to be available for unrestricted use unless specifically restricted by the donor. Contributions received that are designated for future periods or restricted by the donor for specific purposes are reported as temporarily restricted support that increases those net asset classes. When a donor restriction expires, that is, when a stipulated time restriction ends or purpose restriction is accomplished, restricted net assets are reclassified to unrestricted net assets and reported in the statement of activities as net assets released from restrictions. The Association had received no permanently restricted contributions as of and for the year end October 31, 2018. Contributions whose restrictions are met in the same reporting period are reported as unrestricted contributions.

### Income Taxes

The Association is exempt from income taxes under Section 501(c)(6) of the Internal Revenue Code and a similar provision of state law. In addition the Association qualifies for the charitable deduction under Section 170 (b)(1)(A) and has been classified as an organization that is not a private foundation under Section 509 (a) (2). Advertising sales

and certain other revenues, net of related expenses, are taxed as unrelated business income. The Organization is generally no longer subject to examinations by taxing authorities for years prior to 2016. No current income tax examinations of the Corporation's income tax returns are in progress.

#### **Functional Allocation of Expenses**

The costs of supporting the operating programs and other activities have been summarized on a functional basis in the statement of activities and the statement of functional expenses. Accordingly, certain costs have been allocated to the program and supporting services which benefit the association. As of October 31, 2018, all expenses have been allocated to unrestricted activities.

#### **Concentrations of Risk for Cash Held in Bank**

Financial instruments that potentially expose the Organization to concentrations of credit and market risk consist primarily of cash and cash equivalents. The Association has cash on deposit with financial institutions in excess of insurance limits at various short periods of time during the year. The cash held by the Association at October 31, 2016, is maintained at quality financial institutions and credit exposure is limited to the amount in excess of the insurance at any one institution. Management and the Board of Trustees review the funds periodically to ascertain the risk as related to the referred financial institution.

#### **Cash and Cash Equivalents**

Cash, cash equivalents, and Investments at October 31, 2018 include the following:

BancFirst	\$ 241,198
BancFirst	119,229
Wachovia Securities, Inc.	<u>265,708</u>
Total Cash and Cash Investments	<u>\$ 626,135</u>

The Association considers all liquid investments with original maturities of three months or less to be cash equivalents except those funds deposited in bank accounts which are restricted in use. At October 31, 2018, cash equivalents consisted of a money market mutual fund with a broker. Cash on deposit at BancFirst in the amount of \$50,611 in the name of the Oklahoma Osteopathic Association Physicians health Fund is restricted in its use. These restrictions preclude the amount from being considered as cash or cash equivalents for the purposes of these financial statements.

**Other Current Assets:**

Accounts and Interest Receivable at October 31, 2018 include the following:

Other Current Assets \$ 56,261

**Inventories and Prepaid Expenses**

The Association held no inventories on October 31, 2018. No Prepaid Expenses were incurred.

**Investments**

The Association has elected to invest part of its unrestricted funds in low-risk mutual funds. These investments are reported at a Fair market Value as of October 31, 2018. The corresponding difference in value is reported as unrealized gain or (loss) which is \$861 at October 31, 2018.

**Accounts Payable**

Accounts payable consists of expenses recorded during the year for which payment had not been made by October 31, 2018. All of the accounts payable are due within 30 days of the end of the year.

Trade Accounts Payable-10/31/18 \$ 63,572

**Revenue Collected in Advance**

Revenue collected during the fiscal year which will not be earned until the fiscal year ending 10/31/2019, is recorded as Unearned Revenue of \$244,910 as of 10/31/18.

**Permanently Restricted Net Assets**

Permanently restricted net assets are restricted to support the Physicians Health Fund:

BancFirst Money Market Account	\$ 50,611
Notes Receivable-Physicians Health	<u>2,750</u>
Physicians Health Fund	<u>\$ 53,361</u>

**Retirement Plan**

The Association has adopted a 401K retirement plan for the benefit of its employees. The Plan requires that 15% of salaries be contributed to the plan for each of the eligible employees (after one year of employment) on an annual basis. The contributions to the plan are made monthly. Therefore, there are no unfunded pension liabilities. The contributions to the retirement plan for the year ended October 31, 2018, is \$38,049.

### **Lease Commitments**

The Association leases certain office equipment and its office space on long-term lease commitments. Rent for the office space for the fiscal year is \$37,789 as of October 31, 2018. The equipment and furniture lease liability for the fiscal year is \$18,000. The leases have been executed with a related organization, and while the term of the arrangement is lengthy, the lease payment amounts are renegotiated in intervals that maintain the rates at fair market values. The lease amounts will increase at a rate of 3% per year beginning with the second year of the lease agreement. The lease was effective on November 1, 2014.

### **Subsequent Events**

The Association has evaluated events through March 27, 2019, the date on which the financial statements were available to be issued. There are no subsequent events to be reported.

### **Going Concern**

The Association relies on membership dues and advertisements to support its operations. It has sufficient investments to cover current operating losses.

# OEFOM Presidential Report

## Oklahoma Educational Foundation for Osteopathic Medicine 2018-2019 Annual Report

Jeffrey L. Shipman, DO, President

The OEFOM has had a successful year for 2018-2019. The 2018-2019 OEFOM Executive Committee is led by myself as president, Kayse M. Shrum, DO, as president-elect, and J. David Ogle, JD as vice president. Beginning in June 2019, the new leadership will be J. David Ogle, JD, president, LeRoy E. Young, DO, president-elect, Marsh Pitman, vice president, and Lana G. Ivy, MBA, CFRE, secretary/treasurer.

The OEFOM awarded two scholarships, totaling \$6,000, to students at OSU-COM who applied for the OEFOM Endowed Scholarship. Please encourage any worthy osteopathic student to apply for a scholarship next year. More information can be found on the Foundation's page on the OOA website. Scholarships are awarded during the OOA's annual convention.

Throughout the year, the Oklahoma Osteopathic Educational Center underwent repairs. The OEFOM financed the replacement of the southeast HVAC unit and upgraded the Board Room's technology. Future upgrades will be painting the building's interior and restroom reconstruction.

Two trustees will be leaving the Foundation's Board of Trustees at the end of this fiscal year: Kayse M. Shrum, DO and Christopher A. Shearer, DO. Thank you Dr. Shrum and Dr. Shearer for your endless support and contribution to the Foundation.

The Trustees would like to thank each of you for your continued support of the Oklahoma Educational Foundation for Osteopathic Medicine. I would like to thank all the current 2018-2019 OEFOM Board Members for their time and commitment:

Jeffrey L. Shipman, DO, President  
Kayse M. Shrum, DO, President-Elect  
J. David Ogle, JD, Vice President  
Lana G. Ivy, MBA, CFRE, Secretary/Treasurer  
Gabriel M. Pitman, DO, Past President/Trustee

Marsh Pitman  
LeRoy E. Young, DO, FAOCOPM *dist.*  
Christopher A. Shearer, DO, FACOI OOA President  
Timothy J. Moser, DO, FACOFP OOA President-Elect  
Richard W. Schafer, DO OOA Vice President

The OEFOM Nominating Committee met in February and would like to present the 2019-2020 OEFOM Board Members:

J. David Ogle, JD President  
Leroy E. Young, DO, FAOCOPM *dist.*, President-Elect  
Marsh Pitman, Vice President  
Lana G. Ivy, MBA, CFRE, Secretary/Treasurer  
Jeffrey L. Shipman, DO, Past President  
Gabriel M. Pitman, DO

Jonathan K. Bushman, DO  
Mark A. Keuchel, DO  
Timothy J. Moser, DO, FACOFP, OOA President  
Richard W. Schafer, DO, OOA President-Elect  
Jason L. Hill, DO, OOA Vice President

Action: Vote of full membership.

# OSBOE Executive Director Report

## Oklahoma State Board of Osteopathic Examiners Annual Report 2018

Deborah J. Bruce, JD, Executive Director

The State Board of Osteopathic Examiners meets quarterly throughout the year. These meetings are scheduled on the third Thursday of March, June and September and the second Thursday of December.

### 2019 Calendar

1st Meeting: March 21, 2019  
2nd Meeting: June 20, 2019  
3rd Meeting: September 19, 2019  
4th Meeting: December 12, 2019

### Members of the Board

LeRoy E. Young, DO, President	Jay D. Cunningham, DO
C. Michael Ogle, DO, Vice-President	Carl B. Pettigrew, DO
Dennis J. Carter, DO Secretary/Treasurer	Katie Templeton, JD
Catherine C. Taylor, JD	Bret Langerman, DO

Oklahoma law charges the Osteopathic Board with the duty to protect the public health and welfare. The Board accomplishes this mission in three ways: licensing, education and discipline. Physicians who meet the eligibility requirements receive an initial or renewed Oklahoma license to practice osteopathic medicine in this state. Physicians who violate the Oklahoma Osteopathic Medicine Act, 59 O.S. § 620 et.seq. are subject to discipline. Board Staff regularly accepts requests to conduct training on the rules and regulations of the profession.

### Licensing

Currently-Licensed Osteopathic Physicians and Surgeons:

In State – 2543  
Out of State – 552  
PGY1 Temporary Residents – 58  
Total - 3153

### License Renewal

Oklahoma law requires all osteopathic physicians licensed in Oklahoma to renew their licenses by July 1, 2019. On-line renewal will be utilized again this year. The Board believes this is a tremendous benefit to physicians because it permits immediate processing and credit card payments. The state legislature mandated that all agencies convert to on-line licensure in order to reduce paper usage. The Board will continue to require all renewals to be done electronically.



## Adverse Reports

In 2018, the Board processed 137 reports by citizens or other regulatory agencies complaining about adverse treatment by osteopathic physicians. This represents a slight decrease over 2017 numbers. In 2018, the Board also reviewed 163 reports of medical malpractice and professional liability payments.

In 2018, 71 cases were opened for investigation. There are currently 32 cases under investigation. Some may result in disciplinary action. In addition to these consumer complaints and reports, the Board addresses many inquiries and referrals throughout the year.

## Discipline

In the past year, 23 new adverse Board actions were reported to the Federation of State Medical Boards' [FSMB] Board Action Data Bank and the Federal Government's National Practitioner Data Bank [NPDB] which affected eighteen (18) Oklahoma licensed osteopathic physicians. These actions were classified by the FSMB as either prejudicial or non-prejudicial. In 2018, there were 17 prejudicial actions – those that modify or restrict licensure. Nine (9) actions resulted in restriction of license or license privileges. The remaining non-prejudicial actions involved reinstatement following disciplinary action. Currently, there are 12 osteopathic physicians practicing on terms of probation, monitoring or with some restriction on their licenses.

## Continuing Medical Education

In 2018, the Board continued the reporting policy for CME. When renewing in 2019, all physicians will again be asked to certify they obtained the appropriate number of credit hours and that these hours meet the requirements of Oklahoma law. All physicians are expected to maintain their own file that verifies such compliance. Rather than the onerous process of verification at the time of renewal, the Board will subsequently conduct regular, random CME audits.

Many physicians continue to attend CME programs that are not accredited by the AOA or are accredited other than Category 1. Many of the specialty hours and most of the hours earned at American Medical Association programs do not receive AOA Category 1 credit. Thus, such hours may not be used to fulfill the annual license renewal requirement. It is the responsibility of the physician to make certain all CME hours meet the requirements of Oklahoma law.

## Board Staff

Deborah J. Bruce, J.D., CMBE	Executive Director
Richard L. Zimmer, CMBI	Chief Investigator
John Mobley, CMBI	Special Investigator
Christi Aquino	Admin. Programs Officer/Licensing Specialist
Kelsey Devinney	Administrative Programs Officer
Kimberly Contreras	Admin Tech
Janis Womack	Clerk I

## Professional Assistance

Daniel J. Gamino, JD	General Counsel
Roma McElwee, JD	Prosecuting Attorney
Duane G. Koehler, DO, FACOFP	Medical Advisor
Timothy Moser, DO, FACOFP	Medical Advisor
Layne Subera, DO	Medical Advisor

# OOPAC Report

## Oklahoma Osteopathic Political Action Committee 2018-2019 Annual Report

Members: LeRoy E. Young, DO, Chair; Lana Ivy, MBA; Treasurer, Michael A Cooper, DO; David R. Hitzeman, DO; Bret Langerman, DO; Terry L. Nickels, DO; Gabriel M. Pitman, DO; Thomas J. Carlile, DO; Maegan Dunn, staff.

The OOPAC Committee met in December of 2018. It was reported OOPAC raised \$36,722.00 in calendar year 2018. Donors included:

### **PLATINUM PAC PARTNERS (\$2,500+)**

Thomas H. Conklin, DO  
V. Ray Cordry, DO  
Monica M. Woodall, DO

### **EXECUTIVE PAC PARTNER (\$1,000-\$2,499)**

Paul F. Benien, DO  
Kenneth E. Calabrese, DO  
Jay Cunningham, DO  
Dale Derby, DO  
Melissa A. Gastorf, DO  
Joseph R. Johnson, DO  
Bret S. Langerman, DO  
Thomas B. Leahey, DO  
Rebecca D. Lewis, DO  
Phillip A. Nokes, DO  
Carl B. Pettigrew, DO  
Gabriel M. Pittman, DO  
Qualls Stevens, DO  
Layne E. Subera, DO

### **PREMIER PAC PARTNER (\$500-\$999)**

Brian A. Allee, DO  
Thomas J. Carlile, DO  
Michael K. Cooper, DO  
Bobby N. Daniel, DO  
Thomas W. Essex, DO  
H. Dwight Hardy, DO  
David F. Hitzeman, DO  
Michael J. Irvin, DO  
John S. Marouk, DO  
Timothy J. Moser, DO  
Terry L. Nickels, DO  
C. Michael Ogle, DO

### **PREMIER PAC PARTNER (\$500-\$999) CONT.**

Thomas H. Osborn, DO  
Christopher A. Shearer, DO  
Jonathan B. Stone, DO  
James R. Turrentine, DO  
Sherri Wise, CPA  
LeRoy E. Young, DO  
Brooks B. Zimmerman, DO

### **PAC PARTNER (\$499 OR LESS)**

Bob R. Abernathy, DO  
Patrice A. Aston, DO  
Brian Berryman, DO  
Anne Winsjansen Burton, DO  
Jonathan K. Bushman, DO  
Gary W. Cannon, DO  
Scott Cyrus, DO, FACOP  
Robin R. Dyer, DO  
George E. Erbacher, DO  
Jason L. Hill, DO  
R. David Hogg, DO  
James W. Hogin, DO  
Lana G. Ivy, MBA  
Randall L. Kemp, DO  
Cary L. Lacefield, DO  
Linda Lantrip, DO  
Judy L. Magnusson, DO  
Susan V. Mathew, DO  
R. Kelly McMurry, DO  
Ashley N. Muckala, DO  
Douglas C. Nolan, DO  
William J. Pettit, DO  
Stanley K. Rogers, DO  
Richard W. Schafer, DO  
Michael A. Whinery, DO  
Stephen W. Woodson, DO

OOPAC monetary transfers in 2018 totaled \$28,600 to candidate committees and \$500 to PACs. In the month before the 2019 legislative session began, the OOPAC contributed an additional \$22,000 to candidates or leadership PACs.

Contributions to state legislators are not allowed during legislative session, but will continue five days after Sine Die (as permitted by law).

# OSU-CHS & OSU-COM Annual Report

## Oklahoma State University Center for Health Sciences & OSU College of Osteopathic Medicine

### 2019 ANNUAL REPORT

Kayse M. Shrum, DO, OSU-CHS President and OSU-COM Dean

## INSTITUTIONAL ACHIEVEMENTS AND RECOGNITION

### Association of American Indian Physicians Forum and Summit

OSU-CHS President Kayse M. Shrum, DO, was a presenter at the 2018 AI/AN Physician Summit in Washington, D.C. in June 2018. She was part of a panel discussion on Native Matriculation & Graduation Rates.

### Kern-Headington Student Center Opens

Thanks to a generous gift from the Kern-Headington families, the new Kern-Headington Student Center opened in September. President Shrum and the OSU-CHS administration hosted a ribbon cutting event for the new space. OSU-COM and CHS students are enjoying the new centrally located student center.

### Legacy Plaza

Thanks to a generous gift from The Anne & Henry Zarrow Foundation, Oklahoma State University Center for Health Sciences (OSU-CHS) was honored to be selected as one of two recipients of an in-kind, transformative gift of Legacy Plaza West, a 14-story office building located at 31st and Yale in Tulsa. The announcement was made in September 2018. The Anne & Henry Zarrow Foundation will transfer ownership of five floors to OSU-CHS once renovations are complete in spring 2020. The five floors in the Legacy Plaza West Tower will provide a state-of-the-art environment where OSU-CHS physicians and researchers will work side-by-side to advance the understanding of brain diseases. The Legacy Plaza gift will enable OSU-CHS to create a central hub for addiction medicine and mental health education, research, and advocacy by consolidating its Department of Psychiatry and Behavioral Sciences, Center for Wellness & Recovery, Center for Integrative Research on Childhood Adversity (CIRCA), and Project ECHO into a single, convenient location. The other eight floors in the west tower have been given to Family & Children's Services, providing the opportunity for OSU-CHS to collaborate with leading mental health-focused nonprofits. In addition to F&CS, the Mental Health Association Oklahoma is located in the Legacy Plaza East Tower.

### Addiction Summit in Oklahoma City

Kayse Shrum, DO, OSU-CHS president and OSU-COM dean, presented as part of a panel at an Addiction Summit in late September hosted by The Oklahoman newspaper. Commissioner Terri White, Oklahoma Department of Mental Health and Substance Abuse Services, spoke, as well as Dr. Andrew Kolodny, one of the nation's leading experts on the prescription opioid and heroin crisis.

### Addiction Medicine Clinic

OSU Medicine is elevating the care of addiction disorders in Tulsa to a new level with the opening of its OSU Addiction Medicine Clinic in September 2018. The Addiction Medicine Clinic is a member of the prestigious Hazelden Betty Ford Patient Care Network and employs the state's first certified academic addiction physicians. The official ribbon-cutting ceremony featured speeches by Oklahoma Attorney General Mike Hunter and Terri White, commissioner of the Oklahoma Department of Mental Health and Substance Abuse Services. The clinic is transforming patient care delivered through our OSU Medicine clinics and the education of our medical students.

### **OSU College of Osteopathic Medicine at the Cherokee Nation**

The Cherokee Nation and Oklahoma State University Center for Health Sciences announced in October 2018 the establishment of the nation's first tribally affiliated college of medicine to be located in Tahlequah, Oklahoma, set to open in 2020. The new OSU College of Osteopathic Medicine at the Cherokee Nation will be an additional location of the OSU College of Osteopathic Medicine in Tulsa. OSU College of Osteopathic Medicine has received approval from the American Osteopathic Association's Commission on Osteopathic College Accreditation for an additional location in Tahlequah, pending a satisfactory site visit in the spring of 2020. Current plans call for the enrollment of an inaugural class of 50 students, starting in the fall of 2020 with a total of 200 students when fully operational. The new medical college will be located adjacent to the W.W. Hastings Hospital campus, and will be 84,000 square feet complete with anatomy laboratory, clinical skills lab, osteopathic manipulative medicine lab, standardized patient labs, and simulation center featuring state-of-the-art hospital/clinic simulation center equipped with life-like computer programmed manikins that mimic a number of medical conditions to teach medical students in specialties such as emergency medicine, pediatric/adult medicine, labor and delivery and newborn care.

### **CIRCA Near End of Third Year of Grant**

CIRCA – the only federally funded (NIH) center focused on understanding and addressing the effects of adversity and promoting resilience – has its main core of investigators now located at OSU-CHS. In 2016, the National Institutes of Health (NIH) awarded OSU Stillwater and OSU-Center for Health Sciences (CHS) an \$11.4 million, five-year COBRE grant to build a collaborative research infrastructure in Oklahoma to support the development of high-potential investigators toward independent federal funding within the area of childhood stress, trauma, and health implications. The Center for Integrative Research on Childhood Adversity (CIRCA) is led by principle investigator and project director, Dr. Jennifer Hays-Grudo, who shares appointments in the Department of Psychiatry at CHS and the Department of Human Development and Family Science in Stillwater.

### **Project ECHO Expands into Education**

TeleED ECHO is a partnership of OSU-CHS Project ECHO and OSU-Tulsa. TeleED ECHO provides opportunities for superintendents, principals and others in position of leadership, especially for schools in rural areas of the state, to share best practices, receive ongoing and timely professional development and collaborate to help resolve complex issues and questions regarding Oklahoma schools and its students. We are adapting the Project ECHO model for health care to the education specialty with the purpose of reducing education disparities in rural and isolated parts of Oklahoma.

### **Cowboy Park**

The last component of the campus enhancement project related to the A.R. and Marylouise Tandy Medical Academic Building was completed in November 2018. The dedication of Cowboy Park brought together faculty, staff, students and donors to enjoy a Cowboy Country Fair with barbeque, live music and entertainment for all ages.

### **Gubernatorial Inaugural Festivities**

Kayse Shrum, DO, OSU-CHS president and OSU-COM dean attended the Pre-Inaugural Ball for Governor Kevin Stitt on Jan. 12 in Tulsa.

## **GIFTS AND GRANTS**

### **\$2.8 Million Combined Scholarship Gifts for Oklahoma FFA and 4-H Students**

Oklahoma State University Center for Health Sciences (OSU- CHS) today announced \$2.8 million in combined gifts for medical school scholarships to benefit rural Oklahoma high school students participating in FFA and 4-H. OSU-CHS was the beneficiary of two significant gifts, \$1 million from the Joseph E. Robert, Jr. Charitable Trust, and \$1.8 million from the Estate of Audrey M. Hendershot.

### **\$475,000 in Scholarships to Support Students at OSU-COM at the Cherokee Nation**

In January 2019, OSU Center for Health Sciences announced the establishment of multiple scholarship funds totaling \$475,000 from the Cherokee Nation, Chickasaw Nation, Choctaw Nation of Oklahoma and 13 private donors in honor of the nation's first tribally affiliated medical school – the OSU College of Osteopathic Medicine at the Cherokee Nation. The new medical school is the result of a historic partnership between OSU-CHS and the Cherokee Nation and is set to open in 2020 on the campus of the Cherokee Nation's W.W. Hastings Hospital in Tahlequah. Scholarship funds will be earmarked for Native American medical students.

## **Center for Health Systems Innovation**

The OSU Center for Health Systems Innovation, a joint venture between the OSU Spears School of Business and the OSU-CHS, together with the Cooperative Extension Network was awarded a \$3.9 million, five-year Centers for Disease Control and Prevention (CDC) grant to start the “Curbing Obesity” program in Oklahoma. Adair and Muskogee counties in eastern Oklahoma will be the initial counties targeted by this project. Oklahoma ranks among the nation’s worst for adult obesity rates (sixth), diabetes (sixth), cardiovascular deaths (second) and cancer deaths (fifth), according to the CDC and the 2014 Oklahoma State of the State Health Report. The two counties initially targeted for these grant efforts have adult obesity rates exceeding 40 percent: Adair (41.3 percent) and Muskogee (40.6 percent).

## **PETE’s Champions**

OSU-CHS Center received a \$2 million, five-year grant from the federal Health Resources and Services Administration to establish a five-year program that will improve health care in rural Oklahoma communities. The OSU Primary care Enhancement and Training for Excellence’s, “PETE’s Champions” project will collaborate with the Osteopathic Medical Education Consortium of Oklahoma (OMECO) to provide leadership, health care transformation and community education training to primary care physicians working in rural, medically underserved communities. The project will be carried out in four community-based primary care sites with high rates of poverty and deaths by heart disease, cancer and opioid overdose. Sites selected are: Choctaw Nation Health Services Authority in Tahlequah, Tahlequah Medical Group in Tahlequah, AllianceHealth in Durant, and Chickasaw Nation Medical Center in Ada.

## **Combating the Opioid Epidemic**

The Center for Wellness & Recovery at OSU-CHS has been awarded more than \$1.8 million in state and federal funds to combat the opioid epidemic in Oklahoma. The two awards will focus on education of the public regarding opioid prescriptions, treatment of those with opioid use disorder, and on training of resident physicians to identify and treat opioid use disorder. The CDC awarded \$1.4 million to the Oklahoma Department of Health and subcontracted to OSU-CHS, will allow the Center for Wellness & Recovery to provide education on the use of prescription opioids, and education and treatment of opioid use disorders in four of Oklahoma’s hardest hit communities. In addition, a \$440,000 award from the Substance Abuse and Mental Health Services Administration will allow the Center for Wellness & Recovery to train all residents on the treatment of opioid use disorder; the three-year project will drastically expand the number of physicians in the state who can prescribe medications used to treat opioid use disorders.

## **Center for Wellness & Recovery**

The Anne and Henry Zarrow Foundation awarded a \$1.075 million gift to support the work of Dr. Jason Beaman as Department Chair for Behavioral Science.

## **Project ECHO**

The Sarkeys Foundation made a gift to Project ECHO for \$125,000 to support the general operations of the program.

## **Office of Justice Grant Award to Forensic Sciences**

The School of Forensic Sciences was awarded a grant in the amount of \$487,647 from the Research and Development in Forensic Science for Criminal Justice Purposes from the Office of Justice Programs (OJP), National Institute of Justice for research on: Exploration of RNA Degradation in Dried Body Fluid Stains as a Means of Estimating the Age of Samples. The goals are to create and analyze bloodstain spotted on blood collection cards and stored for six months under various environmental conditions; and to assess the effect of the substrate harboring a bloodstain on RNA degradation kinetics.

## **OSU-CHS is Now Home to Center for Indigenous Health Research Policy**

OSU-CHS became the new home for the eight-member team of the new Center for Indigenous Health Research and Action (CIHRA). Led by Valarie Blue Bird Jernigan, PhD, MPH, the CIHRA team is currently researching the Food Equity Resource and Sustainability for Health (FRESH) study, funded by the National Institutes of Health. This study will quantify the food environment of the Osage Nation of Oklahoma and examine relationships between the reservation food environment and the health of tribal citizens. The study will also assess the impact of a tribally-led community gardening intervention on vegetable and fruit intake, food insecurity, BMI and blood pressure among Osage families. Study findings and products will inform future studies and assist tribes in Oklahoma and nationally to develop community gardening and other health-enhancing food environment interventions.

## FACULTY AWARDS AND RECOGNITION

### **Pettit Named Inaugural Dean of the OSU College of Osteopathic Medicine at the Cherokee Nation**

William Pettit, DO, and former Provost, OSU Center for Health Sciences and Senior Associate Dean of Academic Affairs, OSU-COM, was named the inaugural dean of the OSU-COM at the Cherokee Nation.

### **2018 Pediatric Resident of the Year**

Angela Tyson, DO, OMM/NMM Fellow, was named the 2018 Outstanding Resident of the Year Award in Pediatric Medicine. She was honored at the 2018 American Osteopathic Foundation's Honors Gala in October in San Diego.

### **Paleontology Faculty and Students Receive Praise at Annual Conference**

OSU-CHS Vertebrate Paleontology faculty and students from the Department of Anatomy and Cell Biology were a strong presence at the 78th Annual Society of Vertebrate Paleontology meeting in Albuquerque, NM. Professors Haley O'Brien, Paul Gignac, and Holly Woodward Ballard were coauthors on oral presentations that are helping OSU-CHS forge links with sister institutions around the country. OSU-CHS research received high praise at the conference, with Holly Woodward Ballard interviewed for an upcoming *Tyrannosaurus rex* documentary, and Paul Gignac interviewed about his work on *Tyrannosaurus rex* bite force and tooth pressures. Anne Weil and Lindsey Yann also attended the conference.

### **Gignac Earns National Research Award**

The American Association of Anatomists announced the selections for its 2019 Service and Scientific Awards, and Dr. Paul Gignac, assistant professor in Anatomy & Cell Biology at OSU-CHS was named the Morphological Sciences Award winner by the AAA Early-Career Investigator Committee. Gignac was honored primarily for his work developing diffusible iodine-based contrast-enhanced computed tomography (diceCT) imaging. Gignac will be recognized during an awards ceremony on April 9 in Orlando.

### **Rural Health Fellows Program**

Congratulations to Xan Bryant, Northeast Regional Coordinator at the OSU Center for Rural Health, who was selected to participate in the National Rural Health Association's 2019 Rural Health Fellows Program. Fifteen fellows were selected from across the country to participate in this yearlong, intensive program aimed at developing leaders who can articulate a clear and compelling vision for rural America.

### **Research Paper Published**

Interim Associate Dean of Biomedical Sciences Dr. Randall L. Davis, professor of Pharmacology in the Neuroinflammation Research Laboratory, and his colleagues in the Department of Pharmacology Kelly McCracken, senior research assistant, and Daniel J. Buck, research assistant, and medical student Gary Cox published a paper in "Neuroimmunology and Neuroinflammation," an open access journal, with focuses on neuroimmunology and neuroinflammation research, and coverage extending to other basic and clinical studies related to neuroscience.

### **Goodell Named President-Elect of HLIS**

John Goodell, MA, AHIP, director of the OSU-CHS Medical Library, was elected as President-Elect of the Hospital Library Interest Section (HLIS) of the South Central Chapter of the Medical Library Association.

### **Patriot Award**

Brian Diener, DO, FACOS, vice-chairman of OSU Department of Surgery, received the Patriot Award by the Oklahoma Employer Support of the Guard and Reserve (ESGR) in recognition of his support of his employees serving in the guard and reserve. The Patriot Award "reflects the efforts made to support citizen warriors through a wide-range of measures including flexible schedules, time off prior to and after deployment, caring for families, and granting leaves of absence if needed." Colonel Raymond Knapp from the Oklahoma Employer Support of the Guard and Reserve presented Dr. Diener with the award.

## STUDENT ACHIEVEMENTS

### 2018 Student Doctor of the Year

Calli Schardein, MSIV, has been named OSU-COM's 2018 Student Doctor of the Year. Schardein was recognized for her commitment to OSU-COM, our community, and to the osteopathic profession. Schardein will represent OSU-COM for the SDOY award at the national level. Schardein is a former Student Government Association president, and has served as 2nd vice chair of the Council of Osteopathic Student Government Presidents. Schardein has also served on the COSGP Mental Health Task Force.

### Research Published in JAMA

Cole Wayant, Biomedical Sciences student, Jared Scott, MSIV, and Matt Vasser, Ph.D., clinical assistant professor in psychiatry at OSU-CHS, had their research article "Evaluation of Lowering the P Value Threshold for Statistical Significance From .05 to .005 in Previously Published Randomized Clinical Trials in Major Medical Journals" published in the Journal of American Medical Association in November 2018.

### OSU-CHS Medical Student Presents at ROGME Symposium

Daniel Sisco presented his research at the ROGME (Research in Osteopathic Graduate Medical Education) Symposium during the Oklahoma Osteopathic Association Winter CME Seminar held January 12 at the Hard Rock Casino in Tulsa. Sisco, who is currently in his first year of medical school, conducted the research as a DO-MS student in the Biomedical Sciences Graduate Program at OSU-CHS. He was one of three applicants selected to present in this symposium.

### Jurassic Foundation Grant

Anatomy and Cell Biology graduate student Christian Heck received a \$1,100 research grant from The Jurassic Foundation. He will use this award to study age-related gait changes in the dinosaur *Maiasaura*.

### D.O. Day on the Hill

OSU College of Osteopathic Medicine and Student Government Association took a record number of 40 students to DO Day on the Hill in Washington D.C. in early March. Another group will visit the Oklahoma State Capitol on March 27 to bring awareness to advocacy in our medical community.

### Ph.D. Candidate Earns First Journal Cover

Anatomy and Vertebrate Paleontology track PhD candidate Todd Green earned his first journal cover in the Journal of Anatomy with his recent open access publication, "Brain-endocast dissimilarity through postnatal ontogeny in archosaurs, with recommendations for comparative neuroanatomical studies."

### Paleontology Faculty and Students Present at Annual Conference

OSU-CHS Vertebrate Paleontology faculty and students from the Department of Anatomy and Cell Biology were a strong presence at the 78th Annual Society of Vertebrate Paleontology meeting in Albuquerque, NM. Graduate students Christian Heck and Todd Green gave presentations at the meeting. Biomedical Sciences graduate students David Kay and Celine Cortes also attended.

## OUTREACH AND ADVOCACY

### OSU-CHS Exclusive Premier of Killing Pain

The OSU Center for Wellness & Recovery and FATE sponsored the exclusive screening premier of Killing Pain in late September 2018. Killing Pain tells the story of the opioid addiction epidemic that is sweeping the nation from one of the most unsuspecting settings – Oklahoma. The Killing Pain series dives into several aspects of the opioid crisis. From personal stories of addiction to the economic pain of the crisis and the biology of addiction in the heartland of Oklahoma.

### Community Suicide Prevention & Awareness Weekend

OSU-CHS hosted a suicide prevention and awareness weekend Oct. 19 & 20 with QPR training, an hour long educational program designed to teach individuals the warning signs of a suicide crisis and how to respond; a panel discussion featuring local experts who discussed suicide in at-risk populations including teens, seniors and active/retired military; and a community resource vendor fair. The weekend culminated with an OSU-CHS sponsored team for the Out of Darkness Walk that was organized by the American Foundation for Suicide Prevention.



### **American Foundation for Suicide Prevention. American Indian Heritage Month**

In November, the Office of Americans in Medicine and Science hosted Principal Chief James Floyd, of The Muscogee (Creek) Nation, to talk about the history of the land that the OSU-CHS campus resides on.

### **Chautauqua Conference on Family Resilience**

The Chautauqua Conference on Family Resilience was held on the OSU-Tulsa campus and was sponsored by OSU Center for Family Resilience and OSU-CHS Center for Wellness & Recovery.

### **Buprenorphine Waiver Training**

In order to battle the opioid epidemic, OSU-CHS has been awarded a grant through the Substance Abuse and Mental Health Services Administration for medication assisted treatment of opioid use disorder. This project offers free training and CME credits to physicians across specialties. The training will better prepare physicians and medical students to identify individuals with opioid use disorders and to engage those patients in medication assisted treatment.

### **National Rural Health Policy Institute**

OSU-CHS students went to Washington D.C. and met and spoke with members of Congress as part of the National Rural Health Association Policy Institute. The students shared stories with members about why they have an interest in rural health.

### **Arubah Community Clinic**

Arubah Community Clinic in Collinsville and OSU-CHS and College of Osteopathic Medicine, began a new partnership in the 2019 spring semester. In January, second-year medical students in the Service-Learning and Community Engagement course began serving at the clinic as part of the volunteer medical team. The OSU-COM focus on rural health makes this a great partnership for service learning opportunities.

### **Pete's Pet Posse in Tulsa**

Pete's Pet Posse Tulsa has 13 seasoned P3T teams that serve both the OSU-CHS and OSU-Tulsa campuses. Therapy dogs are available for students, faculty and staff who need a furry friend to aid them in stress relief efforts, wellness or grievances. P3T is part of OSU's America's Healthiest Campus initiative.

## **PHYSICIAN PIPELINE PROGRAMS**

### **Operation Orange**

A large crowd of six hundred and eighteen high school students experienced a day in the life of an OSU medical student in June as part of OSU-CHS' Operation Orange summer day camp. The camps were located in five locations across Oklahoma: Oklahoma State University in Stillwater, Cameron University in Lawton, Southeastern Oklahoma State University in Durant, Sequoyah High School in Tahlequah and Northwestern Oklahoma State University in Enid.

### **Med-Xtravaganza**

Prospective medical students visited the OSU-CHS campus for the annual Med-Xtravaganza Open House in February 2019. More than 180 students from Oklahoma and out-of-state participated in hands-on demonstrations in the simulation centers, learned about the Rural Medical Track and Project Echo, toured the A.R. and Marylouise Medical Academic building and understand the application process to apply to OSU-COM.

### **OKStars and Native OKStars**

About 20 Oklahoma high school students presented their research projects to peers, faculty and graduate students in July to wrap up a six-week summer internship at Oklahoma Science and Training and Research Students program. OKStars and Native OKStars interns were each paired with a faculty member and research team to conduct scientific studies in biology, anatomy, forensics and other areas.

### **OSU-CHS Hosts Pre-Health Round Up**

OSU-CHS is hosting a Pre-Health Round Up to expose high school students to careers in health care. Students will begin by breaking out into sessions that will allow them to explore all the academic units at OSU-CHS. Students will then attend workshops regarding high school preparedness options and discover all the exciting career opportunities in health care. This one-day event will be open to 300 high school students.

# Bureau, Committee & Council Report

## Department of Professional Affairs Chief: Timothy J. Moser, DO, President-Elect

### BUREAU ON AWARDS

Members: Bret S. Langerman, DO, chair; Michael K. Cooper, DO, vice chair; C. Michael Ogle, DO; Gabriel M. Pitman, DO; Kenneth E. Calabrese, DO; Maegan Dunn, staff

This bureau is comprised of the five immediate past presidents and meets annually to select recipients to receive recognition awards during the Annual Convention. Award categories include: Rookie Physicians of the Year; Awards of Appreciation; Outstanding and Distinguished Service Award; A.T. Still Award of Excellence; and Doctor of the Year.

This report is informational in nature, and no resolutions are presented.

### BUREAU ON MEMBERSHIP

Members: Rebecca D. Lewis, DO, chair; Jonathan B. Stone, DO, vice-chair; Timothy J. Moser, DO; Robin Dyer, DO; Tyler Lenz, staff

The Bureau on Membership has held 9 meetings since May 2018. The bureau made the following recommendations: 37 new members; zero waiver or reduction in dues; 9 life memberships; and zero honorary life memberships. The OOA Board of Trustees approved all recommendations.

As of April 10, 2019, OOA membership is 2,474, including 918 paid members. The total membership number includes students and residents.

This report is informational in nature, and no resolutions are presented.

### BUREAU ON CONTINUING MEDICAL EDUCATION

Jonathan K. Bushman, DO, chair; Jonathan B. Stone, DO, vice chair; Timothy J. Moser, DO; C. Michael Ogle, DO; Michael K. Cooper, DO; Melinda R. Allen, DO; Duane G. Koehler, DO; H. Zane DeLaughter, DO; John L. Owens, DO; Dale Derby, DO; Joseph R. Johnson, DO; Kayse M. Shrum, DO; Nicholas J. Bentley, DO; Natasha L. Bray, DO; Layne E. Subera, DO; Christopher A. Shearer, DO; Ronald S. Stevens, DO; Richard W. Schafer, DO; Jason L. Hill, DO; George E. Erbacher, DO; David H. Good, DO; Karen L. Schafer, DO; Monica M. Woodall, DO; Rebecca D. Lewis, DO; Leslie A. Williams, DO; Kenneth E. Calabrese, DO; Lana G. Ivy, MBA, CFRE, CEO/executive director; and Audrey K. Hendricks, staff.

The Bureau on Continuing Medical Education continues to bring quality educational CME programs to OOA members. This Bureau meets during the Summer and Winter CME Seminars and selects the chairs and topics for future seminars. Clayton H. Royder, DO chaired the 2018 Summer CME Seminar held at the Hilton Garden Inn and Edmond Conference Center in Edmond, Oklahoma. The American Osteopathic Association, as well as the American Academy of Family Practice, granted this program “Medical Advances in Oklahoma” 17 category 1-A AOA / 17 AMA PRA credits. Jonathan K. Bushman, DO chaired the 2019 Winter CME Seminar held at the Hard Rock Hotel and Casino in Catoosa, Okla. The American Osteopathic Association granted this program, titled “Physician Well-Being,” 17 category 1-A AOA credits, and the AAFP granted this program 15.75 AMA PRA credits. This report is informative in nature, and no resolutions are presented.

# BUREAU ON CONSTITUTION & BYLAWS

Members: Richard W. Schafer, DO, chair; Rebecca D. Lewis, DO, vice chair; Christopher A. Shearer, DO; Kenneth E. Calabrese, DO; Timothy J. Moser, DO; Jonathan B. Stone, DO; LeRoy E. Young, DO; Lana Ivy, MBA, CEO/Executive Director, ex-officio member; Maegan Dunn, staff

The Bureau will act upon any changes to the Constitution & Bylaws as well as the Administrative Guide before Board action is taken. The bureau met in September and December 2018. The bureau recommended the following amendments for the 2018 annual meeting:

## 1. Bylaws Article IV, Sections 3 and 4:

### Section 3. Vote

All elections shall be by any form of ballot and a majority of all votes cast shall be necessary to elect. In case of no election on the first ballot, the candidate receiving the fewest number of votes shall be dropped from the list before taking the next ballot, which process shall be repeated until a majority vote is cast for one (1) candidate. Any member of the Association in good standing and in attendance at the business meeting shall be qualified to vote.

### Section 4. American Osteopathic Association House of Delegates

The delegates representing the Oklahoma Osteopathic Association to the House of Delegates of the American Osteopathic Association must be members of their district, state, and national associations. A majority of each delegate's employment activity must be in the state of Oklahoma, unless retired or the OOA Board of Trustees waives this requirement prior to the Nominating Committee meeting. Two of such delegates shall be the current President and President-Elect at the time of the American Osteopathic Association House of Delegates, who shall serve as the Chairman and Vice-Chairman of the Delegation. The remaining such delegates shall be nominated by the Nominating Committee or by nominations from the floor. All elections shall be by any form of ballot. This election shall take place at the regular business meeting of the annual session of the Association and they shall serve for one (1) year, or until their successors are elected. The delegation will then meet to elect their Chief Delegate by any form of ballot vote.

## 2. Bylaws Article I. Membership

### Section 1. Regular Member

Any graduate of a college accredited by the American Osteopathic Association, who is legally qualified by the State Board of Osteopathic Examiners and ethically qualified by the Board of Trustees of the Oklahoma Osteopathic Association to practice as an osteopathic physician and/or osteopathic physician and surgeon is eligible for membership in this Association. An applicant is required to make application in writing for membership in the Association on the prescribed form as furnished by the Executive Director of this Association and shall present the full amount of the fee with said application, which shall be signed by two members of the Association and shall be acted upon by the Board of Trustees. The provisions of this section shall not be retroactive.

Upon receipt of application for membership, the Executive Director shall present the same to the Bureau on Membership for recommendation to the Board of Trustees for their approval or disapproval at a regular or special meeting of the Board.

Any member whose dues or assessments for the current fiscal year remain unpaid after December 31, shall automatically be dropped from membership and such person shall not be permitted to attend any of the Association's official business sessions, or receive any Association membership benefit. If an individual has been lapsed for more than one year and renews his or her membership by paying dues prior to a meeting of the Board of Trustees of the Association, the individual shall be granted provisional privileges and duties of regular members until approval of membership by the Board of Trustees. ~~With the approval of the Board of Trustees of the Association, such an individual upon written request may be reinstated to membership upon the payment of dues and assessments for the current year as well as a \$50 reinstatement fee.~~

In order to maintain membership in the Oklahoma Osteopathic Association, physicians must comply with the American Osteopathic Association's requirement for continuing medical education. All members will be responsible for having their approved continuing medical education credits submitted to the Central Office of the Oklahoma Osteopathic Association.

All regular members in good standing shall have voting privileges.

### 3. Bylaws Article I. Membership

#### Section 7. Out-Of-State Membership

Out-of-State membership may be granted by the Board of Trustees to osteopathic physicians outside of Oklahoma if they submit an application ~~on the prescribed form~~ accompanied by \$100 ~~which is~~ the annual fee for such membership, providing the physician is a member in good standing with his or her respective ~~American Osteopathic Association Divisional Society~~ state licensure board.

## BUREAU ON POSTGRADUATE EDUCATION

Members: Jason L. Hill, DO, chair; Robin Dyer, DO, vice-chair; Moncey Varkey, DO; Kenneth Calabrese, DO; Tyler Lenz, staff

The Bureau on Postgraduate Education met three times this year to discuss ways to assist interns and residents in Oklahoma. The bureau supported the 10th Annual Research Poster Symposium for osteopathic physicians in postgraduate training programs as well as osteopathic medical students, who were invited to participate.

The poster symposium presentations were held at OOA's Winter CME Seminar held in Catoosa, OK rather than the annual convention. This move was made to better utilize staff time during the annual convention. The OOA Board of Trustees approved this recommendation.

Five (5) residents and four (4) students submitted their research to the 10th Annual Research Poster Symposium. Once again, the bureau utilized a digital display for the Poster Symposium for all participants and the three (3) finalists presented during the 2019 Winter CME Seminar. Grants were available to promote ongoing research among osteopathic physicians in training; however, no grants were awarded. Travel reimbursements up to \$100 per person were available to the three finalists.

This report is informational in nature, and no resolutions are presented.

## BUREAU OF NEW PHYSICIANS

Members: Clayton H. Royder, DO, chair; all board members; Tyler Lenz, staff

The bureau identifies ways to welcome new physicians to the association and encourage involvement in the OOA. The bureau met five times over the past year and discussed ways to engage new physicians and residents.

This report is informational in nature, and no resolutions are presented.

# Department of Public Affairs

## Chief: Richard W. Schafer, DO, Vice President

### BUREAU ON LEGISLATION

Members present: LeRoy E. Young, DO, chair; Bob Aran, DO; Patrice A. Aston, DO; Gary Bastin, OOA Lobbyist; Trevor Bickford, OMS II; Jonathan K. Bushman, DO; Kenneth E. Calabrese, DO; Thomas J. Carlile, DO; Dennis Carter, DO; Ashton Clayborn, DO; Brooke Cloud, OMS II; Thomas Conklin, Jr., DO; Michael Cooper, DO; Ray Cordry, DO; Robin S. Dyer, DO; Arlen Foulks, DO; David Good, DO; Greg Gray, DO; Jason L. Hill, DO; David Hitzman, DO; James Hogin, DO; Constance Honeycutt, DO; Heather Ivy, DO; Lana Ivy, MBA; Joseph R. Johnson, DO; Jeanette Kelley, DO; Mark Keuchel, DO; Bret S. Langerman, DO; Thomas Leahey, DO; Troy Lehman, DO; Rebecca D. Lewis, DO; Ronnie Martin, DO; Trudy Milner, DO; Ryan Morgan, DO; Timothy J. Moser, DO; Phillip Nokes, DO; Douglas Nolan, DO; Dave Peyok, DO; Terrell Phillips, DO; Ross Pope, DO; Clayton H. Royder, DO; Richard Schafer, DO; Christopher A. Shearer, DO; Mark Snyder, OOA Lobbyist; Justin Sparkes, DO; Jonathon B. Stone, DO; Layne E Subera, DO; Christopher Trinh, DO; Heath A. VanDeLinder, DO; Monica Woodall, DO; Sherri Wise, ex-officio; Maegan Dunn, staff and Audrey Hendricks, staff

The OOA Bureau on Legislation met seven (7) times from April 2018 to April 2019. Below are the legislative items the bureau took action on.

#### **SB 142 – Oppose**

Regarding nursing homes, if prescribing anti-psychotics in the nursing home, you must have informed consent. If they refuse, you must go through a whole process in order to administer it to them without consent. It imposes a lot of restrictions.

#### **SB 146 – Oppose**

Allowing religious exemption to those working in medical facilities.

#### **SB 155 – Oppose**

Regarding opioid bills, for assessing patients, physician must administer an initial urine drug test to establish a baseline, then periodically administer urine drug tests at random.

#### **SB 242 – Support**

Creates a registration process for pain-management clinics in the state. All registered clinics must be 100% owned by a licensed physician or physicians.

#### **SB 497 -- Oppose**

Pharmacists as a medical provider.

#### **SB 509 – Support**

Step Therapy Reform bill.

#### **SB 801 – Oppose**

Increase scope of practice for nurse anesthetists.

#### **SB 839 – Oppose**

“Waiver of Supervision” for APRNs authorized by the Board of Nursing.

#### **SB 848 – Support**

A cleanup bill for SB 1446 Opioid Bill.

#### **SB 955 – Neutral**

Radiology Tech licensure .

**HB 1027 – Oppose**

Increases prescriptive authority for CRNAs.

**HB 2194 – Oppose**

Expands the definition of “physician” to include individuals with a doctoral degree who are licensed psychologists.

**HB 2288 – Support**

Updates the Oklahoma Clean Air Act to prohibit smoking from all enclosed public places and recreational areas in the state; all enclosed areas and vehicles owned or operated by the state and its subdivisions; all enclosed areas of places of employment; and certain facilities and outdoor public places.

**HB 2349 – Support**

OSMA introduced HB 2349, with us supporting, which would provide a path for APRNs to practice independently. In the bill, it outlines several items: Must be supervised for a minimum of five years by a non-surgical, Oklahoma primary care family practice licensed physician, who has at least 10 years of practice experience; Must receive a minimum of 10,000 hours of clinical in-person with physician supervised care before applying for waiver of supervision is considered by the Board of Medical Licensure; Supervising physician must attest to the competency of the APRN at the completion of their supervisory period; Must be transparent to patients that they are an unsupervised APRN; Unsupervised APRNs must practice in counties with a population less than 25,000; Must create a medical team network as established by the OK Board of Medical License; Cannot supervise another APRN; Must carry accommodating medical malpractice insurance; Must adhere to CME requirements of OK Medical Licensure Board. The waiver is reevaluated every five years and fees associated with this waiver will be set by the legislature.

**HB 2511 – Support**

Income tax exemption for physicians practicing in a rural area with a population of less than 25,000 and is at least 25 miles from the nearest municipality with a population greater than 25,000.

**HB 2638 – Support**

Step Therapy Reform bill.

**State Question 788 – Oppose**

Regarding Medical Marijuana.

**State Question 793 – Oppose**

SQ 793 is an optometry bill which allows Wal-Mart to put optometrists in their stores. This state question will be a change in our constitution whereas SQ 788 was a legislative change. This is on the ballot because there’s a statute in the optometrist’s act that prevents them from being in a commercial setting like Wal-Mart. Wal-Mart has tried to go through the legislature to get it changed but have continued to fail.

The OOA sent out fifteen (15) action alerts between April 2018 and March 2019, through Voter Voice for the following bills: HB 2933, HB 2894, SB 1329, SB 570, HB 2041, SB 839, SB 801, HB 2194, SB 509, and HB 2638.

The OOA again arranged a Doctor of the Day for the month of March. Ten (10) physicians participated and served as Doctor of the Day. We appreciate their time and service to the members of our legislature.

Osteopathic Medicine Day was a success with 35 students, residents and physicians participating in the OOA’s advocacy day. Forty-seven (47) meetings took place with 26 Representatives and 21 Senators.

The OOA, through the Bureau on Legislation, sent a letter to Gov. Stitt in support of the Oklahoma Healthcare Authority’s 2020 proposed budget which would restore provider rates back to 100% of the Medicare provider fee level.

# Department of Business Affairs

## Chief: Kenneth E. Calabrese, DO, Past President

### BUREAU ON FINANCE

Members: Timothy J. Moser, DO, chair; Richard W. Schafer, DO, vice chair; Jason L. Hill, DO, Christopher A. Shearer, DO, Kenneth E. Calabrese, DO; Lana G. Ivy, CEO/executive director

The bureau met nine times during the past year and reviewed monthly financials with the association's certified public accountant, Peter Terranova.

The report is informational in nature, and no resolutions are presented

### BUREAU ON CONVENTION

Members: Timothy J. Moser, DO, convention chair; Richard W. Schafer, DO, program chair; Lana G. Ivy, MBA, CEO/executive director; Audrey Hendricks, staff; Maegan Dunn, staff; Tyler Lenz, staff; and Cheryl Homen, staff.

This bureau met six (6) times to ensure the OOA's 119th Annual Convention "Advocacy: Empowering Physicians, Patients, & the Profession" April 25-28, 2019, at the Embassy Suites Norman Hotel and Conference Center in Norman, Oklahoma, would attract members from all specialties and across the state by providing quality education and social events for networking and reconnecting. The 2019 professional program is offering eight specialty tracks with one new physician track and a free CO\*RE REMS course on Sunday. The 119th Annual Convention has been approved for 25.5 AOA Category 1-A credits.

This report is informative in nature, and no resolutions are presented.

### DISTRICT PRESIDENTS' COUNCIL

Members: Timothy J. Moser, DO, chair (South Central); Dennis J. Carter, DO, vice chair (Eastern); Jennifer R. Ferrell, DO (North Central); John Owens, DO (Northeastern); R. Kelly McMurry, DO (Panhandle); Monica M. Woodall, DO (Southeastern); Phillip A Nokes, DO (Southern); Mercedez Bernard, DO (Southwestern); Gary Cannon, DO (Tulsa); Kenan L. Kirkendall, DO; (Western); John R. Mills, DO (Northwest); Lana G. Ivy, MBA, staff

The District Presidents' Council met jointly with the Past Presidents' Council at the 2019 Winter CME Seminar in Catoosa. Since the last annual meeting 7 districts were visited. A legislative update was given and dinner provided. Each district meeting included an election or reaffirmation of officers, which keeps the districts in compliance with OOA Bylaws.

Southeastern District-Durant

Northeastern District-Catoosa

Southern District-Ardmore

Northwest District-Enid

Southwestern District-Lawton

Western District – Woodward

South Central District – Oklahoma City

This report is informational in nature and no resolutions are presented.

## PAST PRESIDENTS' COUNCIL

Members: Gabriel M. Pitman, DO, chair; Kenneth E. Calabrese, DO vice chair; C. Michael Ogle, DO, Michael K. Cooper, DO; Bret S. Langerman, DO; Gordon P. Laird, DO; Ray E. Stowers, DO; Layne E. Subera, DO; LeRoy E. Young, DO; John F. Rice, DO; Dennis Carter, DO; James W. Hogin, DO; Thomas J. Carlile, DO; Scott S. Cyrus, DO; Trudy J. Milner, DO; William J. Pettit, DO; Duane G. Koehler, DO; David H. Hitzeman, DO; Rudolph J. Wolf, DO; Robert D. McCullough II, DO; Ralph B. Coffman, DO; Terry L. Nickels, DO; Ebb W. Reeves, DO; Thomas R. Pickard, DO; Stanley E. Grogg, DO; B. Frank Shaw Jr., DO; Paul F. Benien Jr., DO; Terence E. Grewe, DO; Ronnie B. Martin, DO; Joseph R. Schlecht, DO; Sheila G. Simpson, DO; Jeffrey R. Jones, DO; Steven D. Hinshaw, DO; Gilbert M. Rogers, DO; Lana Ivy, MBA, CEO/executive director

The Past Presidents' Council met jointly with the District Presidents' Council at the 2019 Winter CME Seminar in Catoosa. The Council discussed previous and upcoming legislation and state budget issues.

This report is informational in nature and no resolutions are presented.

## 2019 NOMINATING COMMITTEE REPORT

Members from the OOA Nominating Committee and their respective Districts met Thursday, February 7, 2019, at the OOA Central Office to make nominations to fill vacancies on the OOA Board of Trustees, Delegates and Alternate Delegates of the American Osteopathic Association (AOA) House of Delegates.

Members in attendance were: Dennis J. Carter, DO (Eastern); John Owens, DO (Northeastern); Christopher A. Shearer, DO (Northwest); LeRoy E. Young, DO (South Central); Phillip A. Nokes, DO (Southern); William J. Pettit, DO (Tulsa); Bret S. Langerman, DO (2013-2014 OOA President); Michael K. Cooper, DO (2014-2015 OOA President); C. Michael Ogle, DO (2015-2016 OOA President); Gabriel M. Pitman, DO (2016-2017 OOA President); Kenneth E. Calabrese, DO (2017-2018 OOA President)

### **Recommendations for consideration by the Membership of the Oklahoma Osteopathic Association:**

#### **2019 Vacancies to be Filled:**

President-Elect (Becomes President): Richard W. Schafer, DO  
Vice President (One-Year Term): Jason L. Hill, DO  
Trustee (One-Year Term ending 2020): Justin S. Sparkes, DO  
Trustee (One-Year Term ending 2020): Teresa Hardesty, DO  
Trustee (Three-Year Term ending 2022): Jonathan B. Stone, DO  
Trustee (Three-Year Term ending 2022): Rebecca D. Lewis, DO  
Trustee (Three-Year Term ending 2020): Christopher C. Thurman, DO  
Trustee (Three-Year Term ending 2021): Robin R. Dyer, DO  
Resident Trustee (One-Year Term ending 2020): Robert Aran, DO

#### **2019 Delegates to the AOA House of Delegates:**

1. Timothy J. Moser, DO
2. Michael C. Ogle, DO
3. Gabriel M. Pitman, DO
4. David F. Hitzeman, DO
5. Layne E. Subera, DO
6. Joseph R. Schlecht, DO
7. Dennis J. Carter, DO
8. LeRoy E. Young, DO
9. Kayse M. Shrum, DO
10. Bret S. Langerman,
11. Christopher A. Shearer, DO
12. Trudy J. Milner, DO
13. Jason L. Hill, DO
14. Jonathan K. Bushman, DO
15. Student Delegate\*



**2019 Alternates to the AOA House of Delegates:**

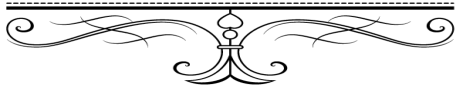
1. Thomas J. Carlile, DO
2. Richard W. Schafer, DO
3. Jonathan B. Stone, DO
4. Rebecca D. Lewis, DO
5. William J. Pettit, DO
6. Douglas C. Nolan, DO
7. Teresa Hardesty, DO
8. Christopher C. Thurman, DO
9. Justin S. Sparkes, DO
10. Robin R. Dyer, DO
11. Duane G. Koehler, DO
12. Tammie L Koehler, DO
13. Clayton H. Royder, DO
14. Arlen R. Foulks, DO
15. Student Delegate \*

\*Determined by OSU-COM student body during 2019 spring semester.



*In Memorial: Deaths in the Osteopathic Family*

Robert T. Means, DO	March 5, 2018
Mark L. Wellington, DO	April 9, 2018
Larry Allen Bell, DO	June 19, 2018
Robert S. Warren, DO	July 13, 2018
Scott E. Dellinger, DO	August 20, 2018
Gerald Wootan, DO	October 4, 2018
Sean E. Neely, DO	November 17, 2018
Ronald L. Heim, DO	November 20, 2018
Ted Kaltenbach, Jr., DO	March 9, 2019
Ray E. Bishop, DO	March 11, 2019
David S. Krug, DO	March 12, 2019
C. Clinton Smith, Jr., DO	March 13, 2019
Dennis Jay McClary, DO	March 25, 2019
Tobi Fried, DO	March 27, 2019
Darryl A. Beehler, DO	March 29, 2019





OKLAHOMA OSTEOPATHIC ASSOCIATION  
ADVOCACY AND WELL BEING

## SAVE THE DATE!

Proper Prescribing: Oklahoma City Seminar  
OOA Central Office  
Oklahoma City, OK  
June 15, 2019  
11 a.m. & 1 p.m.

Proper Prescribing: Tulsa Seminar  
Tandy Building  
Tulsa, OK  
June 22, 2019  
10 a.m.

2019 Summer CME Seminar  
Leslie A. Williams, DO, chair  
Hilton Garden Inn  
Edmond, OK  
Aug. 23 - 25, 2019

2020 Winter CME Seminar  
David H. Good, DO, chair  
Hard Rock Hotel & Casino  
Catoosa, OK  
January 17-19, 2020

120th Annual Convention  
Sheraton Downtown Hotel  
Oklahoma City, OK  
April 23 - 26, 2020