



NATIONAL AYURVEDIC
MEDICAL ASSOCIATION



2019/2020 ANNUAL REPORT

Advancing the Profession of Ayurveda

PRESIDENT STATEMENT - MARGRIT MIKULIS, ND, AD



Reflecting on my first year as NAMA's President, I feel immensely grateful for the opportunity to serve such an incredible organization at a time when the potential of Ayurveda to evolve and gain wider acceptance as a health science is so great. It will take a substantial investment of time and money to reach our goal of formal recognition of the quality standards that our schools and students have worked so hard to develop—but the rewards will be worth it. Ultimately, accreditation is a gift that we will all be able to share for years to come.

Despite the challenges presented by the COVID-19 pandemic, NAMA has persevered and continued to move forward. Even with a few bumps in the road, we have remained on track with accreditation, and our year ended in the black, thanks to savvy budget management. Among our other notable accomplishments were a successful virtual annual event in place of our live conference and the launch of the President's Corner—a community engagement platform that brought together traditional Ayurvedic and current Western perspectives on topics such as COVID-19, healthy lifestyle practices, and immunity. The turnout was wonderful, and I look forward to using this platform to host expert forums on other relevant topics in the future.

In closing, I want to thank all our Ayurvedic leaders, schools, professionals, volunteers, and organizations and all the friends of Ayurveda around the U.S. and the world for their support and hard work on behalf of NAMA's mission. We are blessed beyond measure to have a growing network of individuals who want to expand their Ayurvedic knowledge and share in our vision of the future. NAMA expects to continue making great strides in the coming year, and we send a thousand thanks to everyone for contributing to our success.

Namaste,

Margrit Mikulis, ND, AD

SECRETARY'S REPORT - ALLISON MORSE, AD



As your Secretary, it is my duty to ensure that all required records of the National Ayurvedic Medical Association are up to date and filed as needed to maintain our status as a 501(c)(6) nonprofit organization. Additionally, I oversee the timely submission of our biannual filing of NAMA's continuing operation as a California corporation.

Thank you for the opportunity to serve all of you and for your love of Ayurvedic medicine. We are all in this together, and therefore we share in the bounty of this great profession.

Yours in Health,

Allison Morse, AD

FINANCIAL/TREASURER'S REPORT - WYNN WERNER



I have worked this past year with Hilary Garivaltis, NAMA's Executive Director; NAMA's bookkeeper; the President; and the Secretary in overseeing NAMA's financial reports and assisted in the preparation of the 2020-2021 fiscal year budget that was approved by the NAMA Board of Directors. NAMA's revenue comes principally from membership dues, the annual conference, school program listing fees, and credentialing exam fees.

NAMA had a net worth of \$304,033 beginning July 1, 2019, and ending on June 30, 2020, at \$341,621. It had total income of \$383,661 and expenses of \$346,073, resulting in a net revenue gain of \$37,587, which is great news considering the budget was forecasted to break even and given the impact of COVID-19 on our usual revenue sources, including the replacement of our live 2020 Annual Conference with a virtual event. As a 501(c)(6) nonprofit corporation, NAMA pays no corporate taxes, federal or local, but is required to file a federal IRS 990 and California Form 199 tax return every year. The board of directors retains an accounting firm to prepare the tax returns on our behalf. NAMA is current with all required filing and reporting requirements.

Respectfully Submitted,

Wynn Werner, NAMA Treasurer

Member, Board of Directors

National Ayurvedic Medical Association Profit Loss June 30, 2020

Ordinary Income/Expense

Income

Total 4100 · Contribution Income	2,849
Total 5100 · Program Service Fees	43,022
Total 5200 · Membership Dues	221,751
5310 · Interest	88
5440 · Gross Sales - Inventory	4,416
5445 · Cost of Inventory Sold	0
5450 · Advertising Revenue	0
5490 · Miscellaneous Revenue	10
6000 · Conference Income	
Total 6005 · Conference Registration	90,375
Total 6400 · Conference Sponsorships	22,500
Total 6500 · Conference Exhibitor	0
Total 6600 · Conference Income Other	(1,350)
6000 · Conference Income - Other	0
Total 6000 · Conference Income	111,525
Total Income	383,661

Expense

7010 · Contracts - Program Related	0
7020 · Grants to Other Organizations	0
7040 · Awards & Grants to Individuals	0
7060 · Benefits Paid to or for Members	10,393
Total 7100 · Program Service Expense	1,571
Total 7200 · Membership Dues Expense	9,153
Total 7400 · Payroll and Related	190,929
Total 7500 · Professional Fees	83,887
Total 8100 · General & Administrative	5,680
Total 8200 · Facilities	4,194
Total 8300 · Meetings Fees & Travel	752
Total 8520 · Insurance	4,101
Total 8540 · Development	0
Total 8560 · Outside Computer Services	14,198
Total 8570 · Advertising	415
8590 · Miscellaneous Expense	1,377
8610 · Bad Debt Expense	0
8650 · Business Taxes	10
8660 · Fines, Penalties, Judgements	0
8670 · Organizational Expenses	0
8680 · Merchant Account Fees	392
9000 · Conference Related Expenses	
Total 9009 · Conference Advertising	40
9110 · CE - Postage & Shipping	0
Total 9200 · Conference Printing	970
Total 9400 · Conference Hotel Expense	0
Total 9500 · Conference Equipment	369
Total 9600 · Conference Presenter	2,549
Total 9700 · Conference Management Expense	3,302
Total 9800 · Conference Expense Other	11,793
Total 9000 · Conference Related Expenses	19,023
Total Expense	346,073
Net Income	37,587

EXECUTIVE DIRECTOR REPORT AND OVERVIEW - HILARY GARIVALTIS, CAP



The 2019/2020 fiscal year was a busy year for the NAMA staff, as we worked hard to build out the initial groundwork for accreditation and embarked on a new two-year continuing education cycle for our Professional Members. We have been working on refinements to our processes and website to improve our efficiency and optimize communication flows. We have continued our search for a more robust and user-friendly management system to transition to in 2021 as we continue to grow our organization.

This year brought surprises as well, as we had to shift from our scheduled live conference to our very first virtual conference. I couldn't be prouder of our team for pulling it off in just over one month. Though COVID-19 threw all of us a curve, our successful virtual conference helped keep our community together during a time when we all needed it the most. We continue to strengthen the infrastructure for the Ayurvedic profession by developing certification exams, establishing an accreditation process for our educational institutions, and creating more continuing education opportunities for our professionals. There is so much more for us to do, and with your help, we will continue to promote the growth of Ayurvedic medicine into a well-established healthcare option for all Americans.

In great appreciation,

Hilary Garivaltis, CAP

STRATEGIC PLANNING AND FINANCE COMMITTEE REPORT

Chair: Margrit Mikulis, ND, AD

Members: Hilary Garivaltis, CAP; Amish Shah; Heather Grzych, CAP; Susan Weis-Bohlen; Kathy Jo Staheli, AD

Our committee focuses on supporting the strategic and organizational goals of NAMA. Our job is to serve the NAMA Board of Directors and help execute the board and organizational directives. Strategic and operational decisions must ultimately translate into action; therefore it is the mandate of this committee to pursue an action-oriented approach to helping NAMA grow.



It is within NAMA's mission to advance the Ayurvedic profession in the United States. Knowing this, we are steadfastly working on growing our organization, and more importantly, growing the Ayurvedic profession. This key distinction entails an understanding that although Ayurveda is an ancient medical system with a rich heritage, it is still in its infancy as a healthcare profession in the United States. NAMA's leadership understands this and, for 20 years, has dedicated time and financial resources to building a successful future for Ayurveda as a profession.

The emphasis in this last year has been on evaluating our need to adopt a national strategy in order to better understand the perception of Ayurvedic medicine in the United States. We reviewed proposals from different organizations and decided to engage with San Diego State University's MBA Business Consulting program.

The primary goal of this engagement was to assess NAMA's structure, current initiatives, and pathways to membership growth in order to establish the organization's vision and plan for the next 10 years. The five key areas of the 10-Year Strategic Plan included the following:

- Fundraising for Accreditation and National Legislative Strategy
- Marketing and Communications Strategy
- Research and Competitive Analysis
- Increasing Membership and Continuing Education Efforts
- Relationships and Partnerships with Other Companies, Countries, etc.

In this next year, our committee will continue to secure revenue for our organization by providing direct financial and organizational support for accreditation and the work of NAMAC. Additionally, we will implement the changes needed to refine our organizational structure and performance management capability. Finally, our committee will focus on helping NAMA execute the important strategic and operational decisions needed for success and growth.



MEMBERSHIP COMMITTEE REPORT

Chair: Jolynne Flores

Members: Erin Casperson, CAP, Chair of Schools Subcommittee; Heather Grzych, CAP, Chair of Professional Members Subcommittee; Maria Radloff, Chair of Students Subcommittee; Anjali Deva, CAP; Beena Vesikar, BAMS, AD; Larry Mangel, CAP; Madison Madden, AD; Nicole Peterson, CAP; Petra Neiger, CAP; Casey Czuj; Jamila Grass; Jennifer Kurdyla; Laura Klover; Marie-Josephine Royall-Schreck; Monica Guterrez; Sirisha Nishtala; and Zahir Sutarwala

The Membership Committee assesses NAMA’s membership needs, requirements, and benefits, and the dues levels required to support the growth and viability of all segments of membership: professional, students, general, and organizational (e.g., schools, service providers, and vendors). Our goals of increasing the retention rate and attracting new members in all membership categories entail the following responsibilities:

- Providing input to the processing and approval of new Professional Members throughout the NAMACB examination process for AHCs and APs
- Supervising the processing and approval of AD applicants
- Serving all Certified Non Members until the NAMACB is able to provide its own staff
- Serving formerly board certified professionals until they regain their board certification
- Supervising the processing and approval of new schools seeking to offer NAMA recognized programs
- Overseeing the processing and approval of new Student Members by ensuring that each applicant is a currently enrolled Ayurvedic student in a qualifying program
- Working with Ayurvedic schools to support their efforts to provide a NAMA-recognized education and helping them to promote Student Membership
- Providing valuable and consistent communications to members in partnership with the Communications Committee through weekly ENEWS and website postings

Focus for FY 2020-2021

- Find those interested in regaining their board certification and moving out of lapse
- Prepare for the launch of the Ayurvedic Doctor exam by encouraging AD Professional membership prior to the beta; and then promoting the AD beta prior to the live AD exam
- Welcome NAMA-recognized AYT programs and the first AYT graduates
- Increase overall membership by retaining current members and acquiring new members through free Student Membership, collaboration with member schools, and the cultivation of stronger Professional Member support
- Continue to work to increase the value of NAMA Professional Membership
- Strengthen member awareness and understanding of membership benefits
- Prepare to launch Pañcakarma Technician add on category for professional members

Membership Growth

July 1, 2019 - 1,543
 July 1, 2020 - 1,622
 5 percent increase

Retention Rate

95 percent

History of NAMA Membership Growth for Key Growth Areas

Year	Total	Professionals	Students
EOY-14	717	386	142
EOY-15	1,147	802	138
EOY-16	1,131	767	135
EOY-17	1,279	918	181
EOY-18	1,561	961	362
EOY-19	1,543	889	405
EOY-20	1,622	917	457

Growth

- Professional Membership - 889 to 917 for 3 percent decrease
- General Membership -170 to 182 for 7 percent increase
- Student Membership - 405 to 457 for 13 percent increase
- Organizational Membership - 79 to 66 for 16 percent decrease

MEMBERSHIP SUBCOMMITTEES



PROFESSIONAL MEMBERS SUBCOMMITTEE

Chair: Heather Grzych, CAP

The subcommittee recognized the need for reliable data points for gauging how the Ayurvedic profession is trending year to year in the United States and administered its first annual survey on how Professional Members practice, which had an impressive 33 percent response rate. Another big effort during the year was assisting with outreach to our fellow board-certified professionals who were on the verge of falling into lapse if they did not complete their PACE requirements by January 31, 2019. Lastly, the subcommittee advocated for more improvements to NAMA's website to make it more user friendly for Professional Members.

SCHOOLS SUBCOMMITTEE

Chair: Erin Casperson, CAP

The Schools Subcommittee is focused on developing a community of schools to share best practices, prepare graduates for the NAMACB exam and NAMA Professional Membership, and prepare ourselves for accreditation. We have strengthened our ties with the NAMACB and NAMA's Students Subcommittee.

Since March we have shared best practices repeatedly as most of us have had to adapt to an all-online education due to the pandemic.

We received biannual reports on how many graduates are taking the exams and which schools are sending students to take those exams.

STUDENTS SUBCOMMITTEE-

Chair: Maria Radloff, AP Student

The Students Subcommittee's mission is to (1) grow student membership; (2) support and connect student members; and (3) transform Student Members into Professional Members. As a group that is only in its second year as an official NAMA Subcommittee, we are thrilled to see the impact of our work.

The launch of the new mandatory exam for AHC and AP Professional Members in 2018 has made helping students learn and prepare for it a big priority for us. We have used onboarding calls, surveys, and student mingles to inspire and communicate with potential exam candidates and obtain useful feedback.

Students Subcommittee members have been the primary support for developing PACE conference quizzes so that members may continue their education as required by NAMA membership by purchasing recordings of conference sessions.

And our most exciting new project is our bimonthly online student mingles held on Zoom. These online forums enable students to ask our panel of Professional Members questions on a specific Ayurvedic topics, such as careers and industry statistics.



COMMUNITY AND CONTINUING EDUCATION COMMITTEE

Chair: Arya Hawkins, CAP

Members: Susan Etheridge, CAP; Victor Briere, AD; Antonio Arigona, AD; Dhanada Kulkarni, BAMS, AD; Prema Shakti, CAP



PACE SUBCOMMITTEE

Accomplishments:

Shifted to a new and more browsable PACE listing page to improve the user interface
Created opportunity for PACE providers to boost their listings
Prepared to transition the Seminars in Ayurveda from audio to video starting in the summer of 2020
Supported the posting and sale of past conference videos for continuing education credits (We now have 2019 and 2020 conference lectures available on the NAMA website)



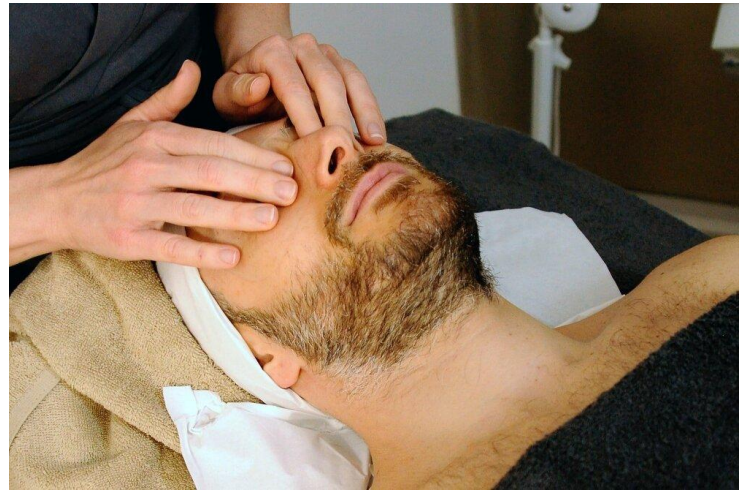
STANDARDS COMMITTEE

Chair: Alakananda Ma, MB, AD

Members: Jayarajan Kodikannath, BAMS, AD; Dhaval Dhru, MD, AD; Margrit Mikulis, ND, AD; Arun Deva; Hilary Garivaltis, CAP; Monica Groover, PhD; Anupama Kizhakkeveetti, BAMS, AD

The NAMA Standards Committee continued to work on editorial refinements to our various Competency Guidelines, Scope of Practice (SOP), and definitions documents to ensure ease of use for all parties. Some of the major steps taken include finalizing in-person hours for AHC, AP, and AD programs, adding business and ethics competencies to all sets of competency guidelines, and increasing the AD hours requirement to 4,000. The AP and AD competencies have been adjusted to differentiate these two levels and make it feasible for schools to meet the AP competencies in the allotted time. The SOP for APs and ADs has been adjusted accordingly.

STANDARDS SUBCOMMITTEES



AYURVEDIC YOGA THERAPY SUBCOMMITTEE

Chair: Arun Deva

Members: Maria Garre; Jennifer Rioux

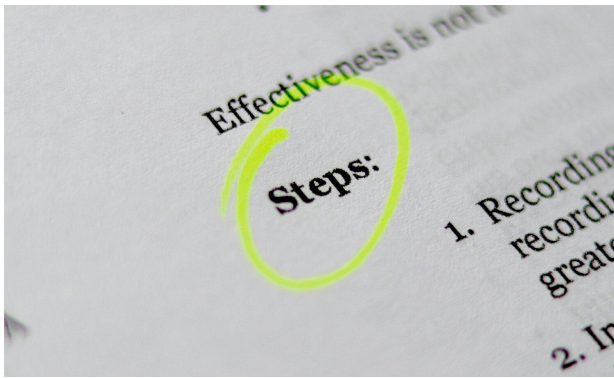
As noted in last year's annual report, the AYT Subcommittee stopped accepting new grandfathered applications at the end of March 2019. The final number of approved Ayurvedic Yoga Therapists was 59. In May of 2020 the subcommittee presented a full application package to the NAMA schools at a schools meeting. The subcommittee had interacted with schools previously, including holding dedicated school meetings at previous NAMA Annual Conferences to update them on continued progress in the development of the Ayurvedic Yoga Therapist standards. After May 2020, the AYT Subcommittee went on hiatus, pending further activity when school applications start to come in. In the coming fiscal year 2020/2021 the subcommittee will reconvene and begin accepting AYT program applications.

PANCHAKARMA SUBCOMMITTEE

Chair: Margrit Mikulis, ND, AD

Member: Allison Morse, AD

This subcommittee finalized the details for the PKT Application, which will be launched late 2020. Once applications are received, they will be reviewed by the subcommittee members. It is exciting for our subcommittee to know that this additional Ayurvedic category will become an option for Ayurvedic professionals to apply for and pursue as a career path.



EDUCATIONAL GUIDELINES SUBCOMMITTEE

Chair: Alakananda Ma, MB, AD

Members: Prasad Vinjamury; Dhaval Dhru, MD, AD;
Jayarajan Kodikannath, BAMS, AD

The subcommittee continues to work on refinements to the Competency Guidelines intended to help differentiate the AP and AD levels, particularly regarding herbal compounds, making it easier for schools to adjust content appropriately.



AYURVEDIC PROGRAM REVIEW SUBCOMMITTEE

Chair: Hilary Garivaltis, CAP

Members: Alakananda Ma, MB, AD; Dhaval Dhru, MD, AD; Jayarajan Kodikannath, BAMS, AD; Suhas Kshirsagar, BAMS, MD (Ayu), AD

This subcommittee reviews all program applications from the Ayurvedic Health Counselor, Ayurvedic Practitioner and Ayurvedic Doctor program submissions.

2020 CONFERENCE COMMITTEE

Chair: Hilary Garivaltis, CAP

Members: Jayarajan Kodikannath, BAMS, AD; Suhas Kshirsagar, BAMS, MD(Ayu), AD; Raja Sivamani, MD, MS, CAT; Dhaval Dhru, MD, AD; Bill Dean; Arya Hawkins, CAP; Kathy Jo Staheli, AD; Julie Wardwell; Jolynne Flores



The 2020 Annual Conference was originally scheduled to take place April 24-26, 2020, at the Art of Living Retreat Center in Boone, NC. Due to the COVID-19 epidemic, NAMA cancelled the live event and produced a fully virtual event within a six-week turnaround period. All but a few presenters were able to accommodate the new format, and NAMA was able to offer discounted prices and packages for 1-, 2-, and 3-day options. We had 400+ attendees, 34 speakers, and 9 sponsors. The conference succeeded in contributing a revenue gain to NAMA's overall yearly income. Responses to the post-Conference survey were overwhelmingly positive, though many respondents were sad that we could not be together in person. We realized that we can run a successful virtual event and can be ready if we have to do it again.

LEGAL COMMITTEE



Chair: Hilary Garivaltis, CAP

Members: Maria DeSousa, Susan Etheridge, Mamta Landerman, Heather Baines, David McConaghay, Wynn Werner

- Created a Cooperation Agreement between NAMA and state associations
- Developed a grant application for state associations in need of support for state legislative work
- Worked on disclosure agreement templates to share with state associations that they can refine as needed according to individual state laws

State Association Subcommittee

Chair: David McConaghay

- Subcommittee members met several times to continue to support one another in building their associations.
- Five states (i.e., California, Colorado, Florida, Minnesota, and Wisconsin) have established a nonprofit entity and are holding meetings.
- Four or five states are working toward setting up an association and are at various stages in the process.
- Two states (i.e., Massachusetts and Wisconsin) are active with "Safe Harbor" bills in their legislative bodies.

NOMINATIONS AND ELECTIONS COMMITTEE

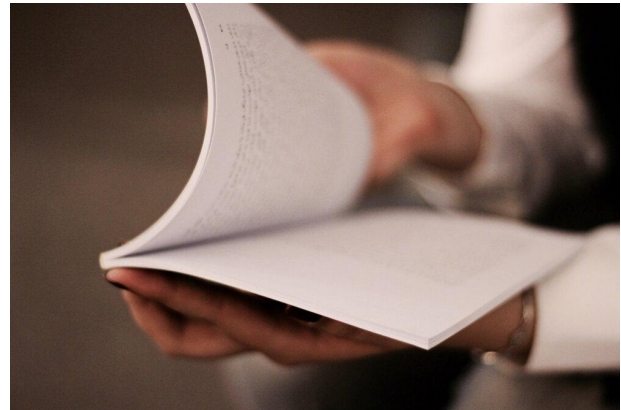
Chair: Jolynne Flores

Members: Margrit Mikulis, ND, AD; Dhaval Dhru, MD, AD; Arun Deva

Candidates submitted paperwork in May and the election started July 1-31, 2019. Four seats were open, and eight applications were



submitted. The membership voted in two incumbents—Alakananda Ma and Jayarajan Kodikannath—and two new board members—Heather Grzych and Susan Weis-Bohlen. Three of the members will serve three-year terms and Susan Weis-Bohlen will serve a one-year term. Each election cycle we have a minimum of four seats open.



ETHICS COMMITTEE

Members:

May 1, 2019 to November 1, 2019 - Arun Deva, Monica Groover, PhD and Margrit Mikulis, ND, AD

November 1, 2019 to May 1, 2020 - Anupama Kizhakkeveettil, BAMS, AD; Dhaval Dhru, MD, AD and Wynn Werner

May 1, 2020 to November 1, 2020 - Jayarajan Kodikannath, BAMS, AD; Heather Grzych, CAP and Dhanada Kulkarni, BAMS, AD

November 1, 2020 to May 1, 2021 - Alakananda Ma, MS, AD; Dinesh Gyawali, PhD, BAMS, AD and Susan Weis-Bohlen

The committee oversees reviews of our Conflict of Interest and Duty of Loyalty forms for all committee volunteers, board members, and staff throughout the year and for all new board nominees as well as any complaints or grievances against NAMA members.

RESEARCH COMMITTEE

Chair: Raja Sivamani, MD, MS, CAT

Members: Diana Lurie, PhD, CAP; AnShraddha Ravani, Priyanka Ingles

We organized a call for research poster presentations for the 2020 Annual Conference.

Poster presentations were cancelled due to cancellation of live conference event.



NATIONAL AYURVEDIC MEDICAL ASSOCIATION CERTIFICATION BOARD

Chair: Diana Lurie, PhD, CAP

Members: Cynthia Copple, AD; Dhaval Dhru, MD, AD; Shivaram Prasad Vinjamury; James Laskin; Ashlesha Raut, MD (AYU), BAMS, AD; Hilary Garivaltis, CAP

The NAMACB has had a busy and productive year. Dr. Anusha Seghal, BAMS, MD (Ayu), AD, rotated off the board, and we added two new members, Vaidya Ashlesha Raut, BAMS, MD (Ayu), NC, HHP, BCIM, RYT-200, AD, and Dr. James Laskin, PhD (Professor of Physical Therapy, the University of Montana). These new members bring a breadth of knowledge and experience to the NAMACB, and we welcome their participation. The NAMACB continues to refine and streamline the certification process, including the exam process and the acquisition of continuing education (CE) credits.

This year was the first that did not allow a grace period for completing board certification requirements, including CE credits. Over 950 Ayurvedic professionals successfully completed their certification. Unfortunately, 400 members fell into lapse.

Notably, from July 2019 to June 2020 we had 20 practitioners take the AHC exam and 15 practitioners take the AP exam. A total of 73 percent of AHC test takers passed, and 100 percent of AP test takers passed.

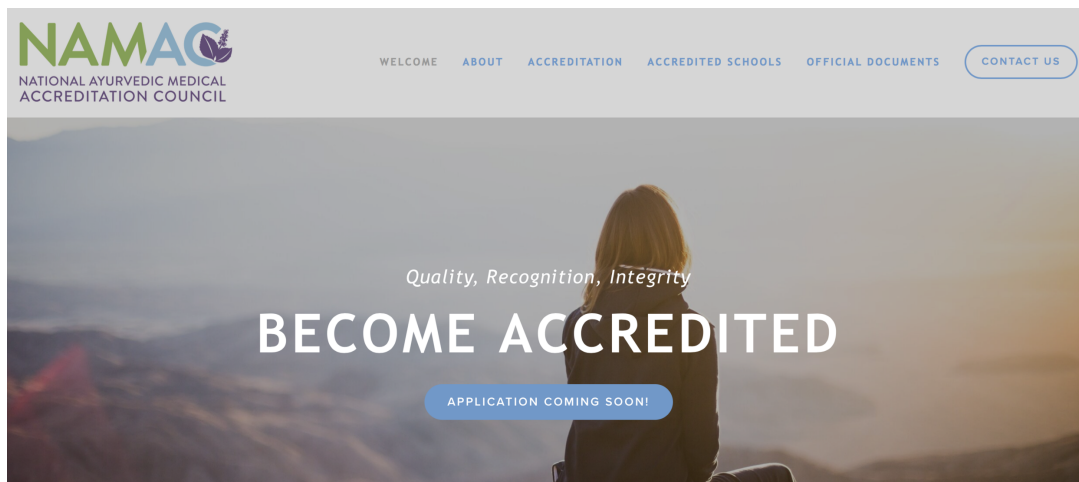
Highlights of the year include the following:

- Restructuring the categories and opportunities for NAMA members to acquire professional Ayurvedic continuing education credits
- Creating an inactive status policy to cover serious, life-affecting circumstances
- (Four members took advantage of the inactive status policy.)
- Writing the new 2020-2021 ethics exam
- Updating the Code of Ethics
- Establishing the NAMACB Ethics Review Subcommittee
- Designing a subject template for non-NAMA recognized schools to complete online to confirm that they provide their students with an appropriate curriculum (Completion of this form will allow students from these schools to sit for the NAMACB exams.)

- Completing study guides and reference guides for the AHC and AP exams
- Continuing the development of the AD exam
- Providing financial support for AHC and AP examinees by offering a 20 percent discount for those registered for the national exam from March 1, 2020 to December 31, 2020
- Implementing (1) a non-refundable exam application fee and (2) a lower price for exam retakes

Goals for the upcoming year include the following:

- Completion and beta testing of the AD exam
- Completion of study guides and reference guides for the AD exam
- Further development of the NAMACB Ethics Review Subcommittee
- Exploration of novel ways to encourage Ayurveda graduates to take the appropriate board certification exams



NATIONAL AYURVEDIC MEDICAL ACCREDITATION COUNCIL (WORKING COMMITTEE UNDER NAMA)

Chair: Jim Ventresca

Members: Alakananda Ma,AD; Suhas Kshirsagar, BAMS, MD(Ayu), AD; Dinesh Gyawali, BAMS, PhD; Ram Rao, CAP; Kathy Lewis; Nanette Bowen

Accreditation Manager: Cynthia Papa-Lentini

During this year, the major priority for NAMAC was twofold to (a) identify the steps, procedures, and activities required for creating a highly operational Accreditation Council for Ayurvedic medical schools and programs and (b) develop policies and procedures for governance and separation from NAMA, our parent organization. This year has been extremely productive for NAMAC as those goals were accomplished in the areas of governance, outreach, stabilization of the Council, and research and assimilation. The Council, in collaboration with NAMA, will be launching a second round of fundraising to establish financial resources for maintaining its work for the next three to four years.