



NATIONAL AYURVEDIC
MEDICAL ASSOCIATION



2020/2021 ANNUAL REPORT

Advancing the Profession of Ayurveda

EXECUTIVE DIRECTOR REPORT AND OVERVIEW - HILARY GARIVALTIS, CAP



The 2020/2021 fiscal year entailed many challenges and achievements for NAMA. Through our connections to each other and the world at large, we all felt the ground shake a bit beneath us. All of us were challenged to listen more closely and to lend support to our communities wherever we could. We all reeled from the losses due to COVID and the heightened awareness of racial and social injustices all around us. NAMA's leadership is working hand in hand with our membership to educate ourselves in ways that will strengthen and support our diverse community.

At the close of our fiscal year, June 30, we secured a strong foundation for the launch of the National Ayurvedic Medical Accreditation Council (NAMAC), which will officially break off from NAMA and become an independent organization on August 9, 2021. The establishment of an accreditation body is one of the most important steps toward gaining validation and recognition for our profession, and we could not be prouder of and more excited for the team that is making sure it happens.

NAMA also celebrated a second major triumph: The National Ayurvedic Medical Certification Board (NAMACB) entered its fourth official year in operation. At this point, the board's accomplishments include the successful launch of two exams and the development of a third exam that will be ready to enter its beta phase in the fall of 2021.

These two initiatives are the culmination of 21 years of unstinting effort by hundreds of volunteers and staff members.

As we all negotiated the pandemic, we capitalized on new ideas and previously unrecognized capabilities and resources. Among them was our newfound ability to host a successful virtual Conference that featured amazing speakers and offered valuable opportunities to continue to deepen our understanding of Ayurveda and the work we all do in the world. I want to thank this year's Conference team including all our speakers, sponsors, volunteers, and staff.

Please take time to review our full Annual Report so that you can learn what each of our Committees of volunteers has accomplished this past year and what all of them hope to accomplish in the year to come. As you will see, our network of almost 100 active volunteers is working on a variety of projects that promise to advance our most important goals. On behalf of all of us, I want to thank the volunteers for their hard work and dedication to our common cause!

In great appreciation,

Hilary Garivaltis, CAP

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 (NAMA) 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 our Secretary in overseeing NAMA's financial reports and assisted in the preparation of the 2021-2022 fiscal year budget, which 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 \$398,109 beginning July 1, 2020, and ending on June 30, 2021, at \$350,795. NAMA had total income of \$374,650 and expenses of \$372,211 resulting in a net gain of \$2,429, which is great news considering the budget was forecasted at a loss of \$29,472. NAMA was able to take advantage of the COVID Paycheck Protection Plan during this difficult year, and that helped offset any losses. As a 501(c)(6) nonprofit corporation, NAMA pays no corporate taxes, federal or local, but is required to file federal IRS 990 and California form 199 tax returns 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

NAMA Balance Sheet June 30, 2021 – Annual Report

	<u>Jun 30, 21</u>	<u>Jun 30, 20</u>	<u>\$ Change</u>
ASSETS			
Current Assets			
Checking/Savings			
1010 · Bank of Am Operating 7169			
1011 · PPP Operating Funds	-1,503.00	0.00	-1,503.00
1010 · Bank of Am Operating 7169 - Other	<u>27,919.78</u>	<u>57,696.23</u>	<u>29,776.45</u>
Total 1010 · Bank of Am Operating 7169	26,416.78	57,696.23	31,279.45
1030 · Bank of Am Conferences 1225	142.00	142.00	0.00
1040 · Petty Cash	58.09	58.09	0.00
1050 · Bank of Am Savings 1828	<u>304,178.49</u>	<u>340,213.19</u>	<u>36,034.70</u>
Total Checking/Savings	330,795.36	398,109.51	67,314.15
Accounts Receivable			
1110 · Accounts Receivable	0.00	0.00	0.00
1115 · Allowance for Doubtful Accounts	<u>0.00</u>	<u>0.00</u>	<u>0.00</u>
Total Accounts Receivable	0.00	0.00	0.00
Other Current Assets			
1410 · Inventories for Sale	0.00	0.00	0.00
1450 · Prepaid Expenses	20,000.00	0.00	20,000.00
1451 · Clearing	<u>0.00</u>	<u>0.00</u>	<u>0.00</u>
Total Other Current Assets	<u>20,000.00</u>	<u>0.00</u>	<u>20,000.00</u>
Total Current Assets	350,795.36	398,109.51	47,314.15
Fixed Assets			
1640 · Furniture, Fixtures & Equipment	0.00	0.00	0.00
1745 · A/D Furniture, Fixtures & Equip	<u>0.00</u>	<u>0.00</u>	<u>0.00</u>
Total Fixed Assets	0.00	0.00	0.00
Other Assets	<u>0.00</u>	<u>0.00</u>	<u>0.00</u>
TOTAL ASSETS	<u><u>350,795.36</u></u>	<u><u>398,109.51</u></u>	<u><u>47,314.15</u></u>
LIABILITIES & EQUITY			
Liabilities			
Current Liabilities			
Accounts Payable			
2010 · Accounts Payable	<u>1,856.00</u>	<u>16,405.04</u>	<u>14,549.04</u>
Total Accounts Payable	1,856.00	16,405.04	14,549.04
Credit Cards	0.00	0.00	0.00
Other Current Liabilities			
2100 · Accrued Payroll and Related			
2110 · Accrued Wages	0.00	0.00	0.00
2111 · MA Payroll Taxes Payable	0.00	0.00	0.00

NAMA Balance Sheet June 30, 2021 – Annual Report

2112 · TX Payroll Taxes Payable	0.00	0.00	0.00
2113 · NM Payroll Taxes Payable	0.00	0.00	0.00
2114 · ME/NY Payroll Taxes Payable	0.00	0.00	0.00
2100 · Accrued Payroll and Related - Other	0.00	0.00	0.00
Total 2100 · Accrued Payroll and Related	0.00	0.00	0.00
2200 · SBA EIDL Loan	5,000.00	5,000.00	0.00
2210 · SBA PPP Loan	0.00	35,194.00	35,194.00
2350 · Deferred Revenue	0.00	0.00	0.00
2400 · Payroll Liabilities	0.00	0.00	0.00
2570 · Short Term Liabilities	0.00	0.00	0.00
Total Other Current Liabilities	5,000.00	40,194.00	35,194.00
Total Current Liabilities	6,856.00	56,599.04	49,743.04
Long Term Liabilities	0.00	0.00	0.00
Total Liabilities	6,856.00	56,599.04	49,743.04
Equity			
3000 · Equity	238,130.91	238,130.91	0.00
3010 · Unrestricted Net Assets	103,379.56	65,902.92	37,476.64
3110 · Use Restricted Net Assets			
3112 · State Licensing	0.00	0.00	0.00
3114 · Accreditation	0.00	0.00	0.00
3110 · Use Restricted Net Assets - Other	0.00	0.00	0.00
Total 3110 · Use Restricted Net Assets	0.00	0.00	0.00
Net Income	2,428.89	37,476.64	35,047.75
Total Equity	343,939.36	341,510.47	2,428.89
TOTAL LIABILITIES & EQUITY	<u>350,795.36</u>	<u>398,109.51</u>	<u>47,314.15</u>

NAMA Profit and Loss 2020-2021 Annual Report

	TOTAL
Ordinary Income/Expense	
Income	
4100 · Contribution Income	
Total 4100 · Contribution Income	13,146.78
Total 5100 · Program Service Fees	43,944.50
Total 5200 · Membership Dues	156,282.16
5310 · Interest	165.30
5440 · Gross Sales - Inventory	1,314.90
5445 · Cost of Inventory Sold	0.00
5450 · Advertising Revenue	0.00
5490 · Miscellaneous Revenue	0.00
6000 · Conference Income	
Total 6005 · Conference Registration	104,592.68
Total 6400 · Conference Sponsorships	20,000.00
Total 6500 · Conference Exhibitor	0.00
6000 · Conference Income - Other	0.00
Total 6000 · Conference Income	124,592.68
Total Income	339,446.32
Expense	
7010 · Contracts - Program Related	0.00
7020 · Grants to Other Organizations	500.00
7040 · Awards & Grants to Individuals	0.00
7060 · Benefits Paid to or for Members	8,776.00
Total 7100 · Program Service Expense	7,392.78
Total 7200 · Membership Dues Expense	5,732.20
Total 7400 · Payroll and Related	187,851.58
Total 7500 · Professional Fees	80,310.25
Total 8100 · General & Administrative	7,129.88
8200 · Facilities	
Total 8200 · Facilities	5,250.00
Total 8300 · Meetings Fees & Travel	850.00
Total 8520 · Insurance	4,780.39
Total 8540 · Development	0.00
Total 8560 · Outside Computer Services	48,411.52
Total 8570 · Advertising	200.00
8590 · Miscellaneous Expense	312.31
8610 · Bad Debt Expense	0.00
8650 · Business Taxes	15.00
8660 · Fines, Penalties, Judgements	0.00
8670 · Organizational Expenses	255.00

NAMA Profit and Loss 2020-2021 Annual Report

8680 · Merchant Account Fees	251.05
9000 · Conference Related Expenses	
Total 9009 · Conference Advertising	359.00
Total 9600 · Conference Presenter	4,068.28
Total 9800 · Conference Expense Other	9,766.19
9000 · Conference Related Expenses - Other	<u>0.00</u>
Total 9000 · Conference Related Expenses	<u>14,193.47</u>
Total Expense	<u>372,211.43</u>
Net Ordinary Income	-32,765.11
Other Income/Expense	
Other Income	
PPP Grant Income	<u>35,194.00</u>
Total Other Income	35,194.00
Other Expense	
9999 · Uncategorized Expense	<u>0.00</u>
Total Other Expense	<u>0.00</u>
Net Other Income	<u>35,194.00</u>
Net Income	<u><u>2,428.89</u></u>

NAMA Committees

NAMA has several Committees and Subcommittees operating on a volunteer basis, with over 70 individuals engaged. All the NAMA Committees and summaries of their work for the year are listed below.



STRATEGIC PLANNING AND FINANCE COMMITTEE REPORT

Chair: Margrit Mikulis, ND, AD

Members: Hilary Garivaltis, CAP; Amish Shah, GM; Heather Grzych, CAP; Susan Weis-Bohlen (General)

Our fiscal year started off with our engagement of the Fowler Group's consulting team from San Diego State University to provide an independent perspective about our operations, marketing, board size and function, and our strategies and vision.

Recommendations from the report:

- Make accreditation NAMA's focus through the next 10 years to legitimize the professional stature of Ayurvedic institutions and programs.
- Create a marketing and communication team with a proposed recommended budget of \$297K to support our staffing needs.
- Work toward developing more partnerships to create more awareness and attract more members.
- Increase the number of educational events hosted by NAMA.
- Decrease board size to improve efficiency; focus on selecting board candidates who share the vision of the board and can fulfill its specific objectives.

In general, we feel confident and excited that the Fowler team's research validated the importance of our efforts to prioritize NAMAC and the accreditation process. Their report helped clarify the overarching direction

of NAMA and confirmed our belief that NAMA should invest in the next steps toward elevating the quality of Ayurvedic medical education and establishing standards of excellence for our profession in the United States.

While we were not surprised at the team's conclusion that we needed more staff, more marketing and communications, and more money/fundraising, we almost fell off our chairs when we saw their suggested marketing budget. Given our current focus on raising money to support NAMAC and our accreditation efforts, their recommendation for our marketing budget was far too ambitious for NAMA to consider in 2020 and 2021, especially during an unforeseen global pandemic.

We did take their advice to implement more educational events for our community. In addition to our Annual Conference, we hosted Ayurveda Day (October 2020) and The Business of Ayurveda (June 2021). In general, these events were well received; however, we overestimated the income from all three events, therefore we did not meet our projected revenue targets.

Additionally, the NAMA board agreed that it was reasonable to gradually decrease our size, in hopes of achieving greater efficiency. The Fowler group suggested we aim for five members, but the NAMA board felt that number was insufficient for our current operational needs. Ultimately, we decided to limit the board to ten members for now with an eye to gradually reducing this number at some point in the future. Finally, we determined that the initial downsizing of the board would take effect during the 2021 election cycle.

In October of 2020, the NAMA board participated in an online weekend retreat. The emphasis of this retreat was to review a proposed Entrepreneurial Operating System (EOS), and NAMA's Accountability Chart, in order to identify the work and communications that fall under NAMA's purview. We spent time together looking at our Core Values, which helped us to further refine our structure, build momentum, and get a genuine sense of who we are.

During the second part of our retreat we reviewed our fundraising plans and our board tasks:

Fundraising Goals and Objectives: 11/2020-12/31/2024

1. Revenue Goals necessary to fund accreditation (Joint effort between NAMA and NAMAC).
2021: \$100,000
2022: \$100,000
2023: \$125,000
2024: \$125,000
Total Amount \$450,000.00
2. Raise the necessary funds to support any additional funding needs of NAMA.
3. Develop an Annual Campaign to launch from November through December each year.
4. Develop monthly donation program.
5. Develop a grant writing subcommittee to work closely with the NAMAC Manager
6. Grow the Fundraising Subcommittee membership to at least 5-10 volunteers.
7. Engage with fundraising experts in the field for strategic and fundraising training.

Board Tasks:

- Determine how much money NAMA is willing to help raise, donate, or lend, over the next four years to fund NAMAC.
- Determine if NAMAC will be able to function as an independent entity starting in 2021.
- Establish how much additional money is needed for other critical NAMA projects.

The Fowler team suggestions were incorporated into our retreat goals and objectives with one exception: applying for Corporate Giving Programs in order to leverage workplace giving as a growth strategy. This Committee should explore this option further as NAMA's fundraising efforts continue to evolve.

Other committee work completed in 2020:

1. Engaged Fundraising Expert Beth Grupp—her advice helped equip the NAMA board with a clearer understanding of how to approach our fundraising strategy
2. Updated Donor Materials
3. Created Donor thank-you call video for the board
4. Completed thank-you calls to past donors

Looking back on these achievements, I can see that this past year was a time of innovation and positive change for our Committee. We looked outside of ourselves a lot more, and this new focus proved to be rewarding. We engaged with specialists who were able to help us implement a different approach, create new processes, and better understand our goals and strategic path. I believe we learned more about ourselves during this time, and although there is always more to know, we can celebrate our success and be proud of our accomplishments.



MEMBERSHIP COMMITTEE REPORT

Chair: Jolynne Flores

Members: Ginger Hooven, CAP, AYT, C-IAYT, Chair of Schools Subcommittee; Madison Madden, AD, Chair of Professional Members Subcommittee; Dhanada Kulkarni, BAMS, AD, Chair of BAMS Task Force; Sirisha Nishtala, Chair of Students Subcommittee; Beena Vesikar, BAMS, AD; Heather Grzych, CAP; Nicole Peterson, CAP; Petra Neiger, CAP; Sina Firouzi, MD, CAP; Anjum Nadaf, BAMS, AD; Monika Manohar, BAMS, AD; Purvi Vyas, BAMS, MD (Ayu), PhD (Ayu), AD; Rucha Kelkar, PT, DPT, BAMS, AD; Sushma Jakkula, BAMS, AD; Aubrey Maryniak; Bhuvana Ramalingam; Ivana Kostic; Lizabeth Gamberdella; Sunil Kanojia; 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, Student, 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 for the processing and approval of new Professional Members throughout the current NAMACB examination process for CAHCs and CAPs and throughout the upcoming exam process for CADs
- Supervising the processing and approval of AD applicants
- Serving all Certified Nonmembers until the NAMACB is able to do so

- Supporting Lapsed Members (i.e., formerly board-certified professionals) by shepherding them through the process of regaining their board certification
- Fostering the growth and preserving the integrity of our Student Membership by ensuring that each student applicant is currently enrolled in a qualifying Ayurvedic program
- Providing information about the NAMACB exam process to Student and General Members
- Supervising the processing and approval of new schools seeking to offer NAMA-recognized programs
- 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
- Guiding NAMA's annual Board of Directors election process
- Directing NAMA's, NAMACB's, and NAMAC's volunteer programs, currently comprising nearly 100 volunteers

FY 2020-2021 Highlights

- Hosted the inaugural Leadership Summit for Volunteers. All NAMA members were invited. The two-hour volunteer-led event featured input from our top leadership (NAMA, NAMACB, NAMAC) and from the Chairs of six key Committees, affording an enlightening view of how each Committee's work fits into the organization's larger effort. As one volunteer who attended said, "THIS is the most valuable NAMA event I have ever attended!"
- Contributed perspective on our membership's needs to NAMA's new Communications Committee through updates from various Subcommittee members on their marketing and website projects.
- Welcomed NAMA's first recognized Ayurveda Yoga Therapist program. There are currently 20 schools comprising a total of 34 NAMA-recognized programs.
- Despite the far-reaching impact of the COVID pandemic, total membership increased by 1 percent, and Professional Membership (which constitutes 55 percent of the membership) decreased by only 1 percent.

Membership Growth

Total membership: 1% increase

July 1, 2020 - 1,622

July 1, 2021 - 1,635

Professional membership: 1% decrease

July 1, 2020 - 917

July 1, 2021 - 907

Student membership: 6% increase

July 1, 2020 - 457

July 1, 2021 - 487

Retention Rate

75 percent

MEMBERSHIP SUBCOMMITTEES

STUDENTS SUBCOMMITTEE

Chair: Sirisha Nishtala, Student



The Students Subcommittee continues to on-board all new Student Members. To date it has reached out to nearly 500 students. Working in tandem with the Professional Members Subcommittee and using the successful in-person Mingle at the 2019 Conference as a model, the Students Subcommittee hosted NAMA's first virtual Mingle in August 2020. Student Mingles are bimonthly events with three NAMA Professional Member speakers who share their experiences on a particular topic. These events have provided students with a highly successful and meaningful learning and networking opportunity outside of our schools. In light of the success of our inaugural Mingle, which highlighted

students' strong interest in learning how to begin an Ayurveda practice, Student Members were urged to join the Business of Ayurveda Subcommittee. Students were also invited to participate in the conceptual design of a NAMA-recognized Fellowship program. The Students Subcommittee included an active Communications Project Team and produced two articles. The Communications Committee took over the production of articles midyear.

PROFESSIONAL MEMBERS SUBCOMMITTEE

Chair: Madison Madden, AD

The Subcommittee expanded this year to include a BAMS task force, whose aim is to create inclusive and valuable support for BAMS-trained vaidyas in the United States.

We forwarded the second annual How You Practice Survey to all Professional Members and offered an extended BAMS-only survey to BAMS members to gain a better understanding of the unique needs and aspirations of this important community within NAMA. Results of this year's and last year's surveys have been used to inform NAMA's decisions and activities, including this year's Business of Ayurveda virtual event.



In conjunction with the Students Subcommittee, we also created and hosted Professional Member "Mingles" to cultivate member engagement and peer-to-peer community building, specifically during the year of the pandemic when in-person connection was limited.

In coordination with the Standards Committee, Students Subcommittee, and BAMS task force, our Subcommittee also led initial efforts to create a NAMA-recognized Ayurvedic Fellowship program.



SCHOOLS SUBCOMMITTEE

Chair: Ginger Kamalesh Hooven, CAP, AYT, C-IAYT

This past year the Schools Subcommittee focused on *satsang* creating a community of colleagues to help one another with concrete ideas on navigating the effects of the pandemic. We shared best online practices while continuing to move toward the new NAMA standards, which were to set to go into effect in mid-2021. We shared our challenges with one another, discussed Clinical Encounters, and reviewed Scope of Practice. We received data on the number of exam takers per school and listened to the NAMACB team's thoughts on what students can expect from the exam. We hope that the schools will see the importance of sending members to these meetings to collaborate and share ideas with one another.

Focus for FY 2021-2022

- Support the launch of the AD beta exam via an outreach campaign to the current AD community, existing Professional Members who may qualify for the exam, AD schools in the United States, and the greater U.S. BAMS community.
- Consider producing a white paper conceptualizing a NAMA-recognized Fellowship program that the Standards Committee could then use to develop relevant standards or that we could refine based on input from the Standards Committee.
- Conceptualize, design, and produce at least one beta Grand Rounds Mingle for the membership.
- Prepare for some NAMA-recognized programs to move from NAMA recognition to accreditation through NAMAC. To ensure participants in these programs retain their membership and listing with NAMA, we will probably need to create a new membership subcategory with separate dues requirements.



COMMUNICATIONS COMMITTEE REPORT

Chair: Kathy Jo Staheli, AD

Members: Anjali Deva, CAP; Chara Caruthers, CAP; Gabriela Franco; Hilda Corell; Louis Haber; Susan Weis-Bohlen

The purpose of this Committee is to review communications strategies and add value to member's relationship with NAMA by providing information and opportunities to expand professional knowledge through email communications, articles, and website development.

Goals

- To develop a comprehensive strategy using media to communicate association news timely and effectively
- To assess communication needs and mechanisms to identify adequacy/deficiencies/improvement opportunities
- To re-evaluate communication program biannually for current suitability and effectiveness

COMMUNICATIONS SUBCOMMITTEES

MEMBERSHIP GROWTH SUBCOMMITTEE

Chair: Hilda Corell

Members: Susan Weis-Bohlen; Ana Chassot-Petersen, CAP; Anjum Nadaf, BAMS, AD, LMT; Jolynne M. Flores

The purpose of this Subcommittee is to oversee the development of email and social media marketing campaigns to highlight the advantages of being a NAMA member.

Goals

The Subcommittee aims to create marketing campaigns that accomplish the following objectives:

- Successfully communicate and engage with members and prospects to inspire them to join NAMA by generating a sense of NAMA's primary importance to the Ayurvedic profession and emphasizing the advantages of having an easy way to stay connected with the organization
- Highlight the benefits of membership in NAMA, a widely recognized nationwide organization that provides broad support to Ayurvedic professionals
- Sustain engagement and nurture relationships by presenting valuable resources and intriguing activities that capitalize on and continue to expand NAMA's social media presence

Project Responsibilities

The Subcommittee focuses on increasing NAMA membership through marketing techniques that target the needs of each of the following membership sectors:

- **Professional Membership:** Recruiting more professionals to become NAMA certified and to ensuring the required professional standards are met and have the support of this organization.
- **Organizational Membership:** Generating more opportunities for NAMA to collaborate with existing and emerging Ayurvedic organizations, such as businesses and educational institutions.
- **Student Membership:** Encouraging current and prospective students to become NAMA members and obtain professional certifications after the completion of their studies. Inspiring prospective students to pursue Ayurvedic training.
- **General Membership:** Establishing and promoting maximum public recognition and acceptance of the Ayurvedic profession, its training programs, and its practices.

ARTICLES AND INTERVIEWS SUBCOMMITTEE

Chair: Louis Haber

Members: Manjusha Gutta, CAP; Nimisha Joshi; Ana-Chassot-Petersen, CAP; Ananda Atama Shakti Jain

The purpose of this Subcommittee is to oversee the development and publication of articles and interviews on the NAMA website that exemplify NAMA's vision and further its mission in the following ways:

- Provide information and insights to NAMA members that enable them to enhance health, well-being, and self-awareness through Ayurveda
- Help protect, promote, and advance the consciousness-based philosophy, knowledge, science, and practice of Ayurveda for the benefit of all beings
- Encourage people to study and pursue careers in Ayurveda as well as to support and join NAMA

To that end, the Subcommittee will develop and oversee a survey of members to gather insights to help us determine what types of articles and interviews NAMA members would want to read and would be helpful to them.



The Subcommittee also plans to work toward the following goals:

- Generate articles that support and advance NAMA's vision, mission, purpose, and goals
- Produce one article per month, ensuring a steady stream of timely, relevant articles, and interviews for the NAMA website
- Engage NAMA members with diverse perspectives and experiences of various authors through their articles

EDUCATION COMMITTEE

Chair: Arya Hawkins, CAP

Members: Susan Etheridge, CAP; Victor Briere, AD; Sirisha Nishtala, Student; Haley Kalb, CAP; Antonio Aragona, AD



PACE SUBCOMMITTEE

Accomplishments

- Shifted to a new and better 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.)

DIVERSITY AND INCLUSION COMMITTEE REPORT

Chair: Tesia Love, CAP, and Alakananda Ma, MBBS, AD

Members: Chara Caruthers, CAP; Anna Castle; Sandhiya Ramaswamy, AD; Jolynne Flores

The NAMA Board of Directors formed the Diversity and Inclusion committee in July 2020 in response to an increased awareness of the need to ensure that NAMA has a culture of diversity, inclusion, and transparency. The board charged the Committee with developing opportunities for community involvement and helping to ensure the path to all roles within the Ayurvedic profession and NAMA are accessible to all members.

The first objective for the Committee was to hire a professional to develop a training webinar for members to explore fundamental issues of diversity and inclusion. As a result, the Committee hired diversity, antiracism, and inclusion trainer Mariama Boney of Achieve More, LLC, who presented a three-part member training in February through April of 2021. The live training, titled Reveal, Realign & Restore, offered the opportunity to earn four PACE credits and was recorded. The recording is available to all NAMA members.

We would like to thank all past and current members of the Committee, including Eduardo Cardona, AD; Keshari Das, CAP; Richard Humphreys, CAP; Tesia Love, CAP; Kay Moore; and Susan Weiss-Bohlen



In this next year, our Committee plans to accomplish the following:

- Create a D&I Statement for the NAMA website
- Conduct a membership survey to identify demographics, ask about views regarding diversity, equity, and inclusion (DEI), and give members an opportunity to share stories of witnessing or experiencing acts of exclusion, racism, and other forms of injustice
- Work and consult with the board to develop a comprehensive DEI plan (goals, outcomes, strategies)
- Establish guidelines for NAMA's communications/imagery to ensure they reflect the organization's DEI values
- Develop strategies to encourage the participation of presenters with diverse backgrounds and perspectives at NAMA Conferences and seminars
- Design outreach strategies (e.g., scholarships, training programs, Conferences) that will promote diversification of the population of individuals who pursue Ayurveda as a profession
- Formulate guidelines/competencies for schools regarding DEI (or at least include a position statement and give a list of resources for schools to use in establishing their own DEI values)
- Generate position statement/guidance/conversation regarding cultural appropriation

STANDARDS COMMITTEE REPORT

Chair: Alakananda Ma, MB, BS, AD

Members: Jayarajan Kodikannath, BAMS, AD; Dhaval Dhru, MD, AD; Margrit Mikulis, ND, AD; Arun Deva, CAP, AYT, C-IAYT; Hilary Garivaltis, CAP; Monica Groover, PhD, AD; Anupama Kizhakkeveetil, BAMS, PhD, AD, MAOM, Lac, C-IAYT

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. We have focused specifically on clarifying the Sanskrit requirements, which up until now have been implicit rather than explicit. We have also worked to create a teacher qualifications document.

STANDARDS SUBCOMMITTEES



AYURVEDIC YOGA THERAPY SUBCOMMITTEE

Chair: Arun Deva, CAP, C-IAYT AYT; and Susan Bass, CAP, AYT, C-IAYT

Members: Julia Abramova, CAHC, AYT; Chaya Heller, CAP, C-IAYT, LMT; Jeff Perlman, CAP, AYT, LMT; Cory Tixier, CAP, AYT; Carolina Dear, CAP, AYT

The AYT Subcommittee has begun to take applications for AYT programs and approved one in 2021. It is working on an interim application path for professionals to join as AYT Professional Members.



PROGRAM REVIEW SUBCOMMITTEE

Chair: Hilary Garivaltis

Members: Jayarajan Kodikannath, BAMS, AD, AYT; Dhaval Dhru, MD, AD; Hilary Garivaltis, CAP; Anupama Kizhakkeveetil, BAMS, PhD, AD, MAOM, Lac, C-IAYT

The Program Review Subcommittee reviews all new applicants for the three professional categories: Ayurvedic Health Counselor, Ayurvedic Practitioner, and Ayurvedic Doctor. The Subcommittee also does annual reviews of all recognized programs to ensure compliance with the NAMA competency standards.



PANCHAKARMA SUBCOMMITTEE

Chair: Margrit Mikulis, ND, AD

Member: Allison Bransfield-Morse, AD

This Subcommittee finalized the details for the PKT application, which will be launched in early 2022. Once applications are received, they will be reviewed by the subcommittee. It is exciting for our Subcommittee to know that this additional Ayurvedic category will become an option for Ayurvedic students and professionals to apply for and pursue as a recognized career path.



GOVERNANCE COMMITTEE REPORT

Chair: Cynthia Copple, AD

Members: Cynthia Copple, AD; Wynn Werner; Dhaval Dhru, MD, AD; Devi Mueller, CAP, Mayu; Hilary Garivaltis, CAP

Mission

This Committee was created in March 2020 to support the NAMA board by (1) reviewing and updating NAMA's organizational policies and (2) creating new policies as the board deems necessary.

Accomplishments

We reviewed and updated the following policies:

- 2.00 Committee Structures and Process, and Initial and Annual Form
- 2.10 and 2.15 Subcommittee Structures and Process, and Initial and Annual Form
- Ethics and Disciplinary Review Panel
- Conflict of Interest Policy and Form
- Election Policies and Procedures
- Grievance Complaint Policy and Form
- Board Meeting Absence Policy and Remediation
- Confidentiality Policy and Agreement
- Volunteer Agreement
- Complementary Conference Support Policy

Currently Reviewing

Membership Classes and Benefits; creating list of potential policies to review next.

Plans for Next Year

We have almost completed the tasks we were assigned and expect in the future to convene on an as-needed basis when the board decides that certain policies should be reviewed, changed, or created.



2021 CONFERENCE AND EVENTS COMMITTEE REPORT

Chair: Hilary Garivaltis, CAP

Members: Jayarajan Kodikannath, BSc, BAMS, AD; Suhas Kshirsagar, BAMS, MD (Ayu), AD, AYT; Raja Sivamani, MD, MS, CAT; Dhaval Dhru, MD, AD; Kathy Jo Staheli; Anupama Kizhakkeveetil, BAMS, PhD, AD, MAOM, Lac, C-IAYT; Margrit Mikulis, ND, AD

The 2021 Conference was held virtually this past year. The Conference theme was Ayurveda: Evidence Based Integrative Medicine. We had 21 sessions for the main Conference and three post-Conference sessions with 47 speakers from both India and the United States represented. We had over 370 attendees from across the United States, Canada, and India.

We want to thank all our sponsors. We cannot run our events without them.

- Kerala Ayurveda
- Athreya Herbs
- Banyan Botanicals
- The Ayurvedic Institute
- Sarasvati Institute
- Mount Madonna Institute
- Harmony Nutraceuticals
- Andrew Weil Center for integrative Medicine
- Shiro Bliss
- Ayurvedika Skincare

The 2022 Conference will be held in Tucson, AZ, at the JW Marriot Starr Resort and Spa on April 22-24, 2022, with a post-Conference day on April 25. The theme of the 2022 Conference will be Ayurveda for Family Health.

NAMA also produced two additional virtual events this past year:

- Ayurveda Day - Ayurveda for Building Immunity on November 13, 2020, with five speakers from the United States and India and over 200 attendees
- The Business of Ayurveda - June 21-23, 2021, with 10 speakers and over 100 attendees

Established in 2017

ADVANCING THE PROFESSION OF AYURVEDIC MEDICINE

NAMACB REPORT

Chair: Diana Lurie, PhD, CAP

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

The NAMACB made every effort this year to help Ayurvedic professionals achieve certification during the COVID-19 pandemic. It was a very challenging year for everyone, and the NAMACB was very pleased to be able to administer our certification exams to test takers at home on their own computers.

Notably, from July 2020 to June 2021 23 Ayurvedic professionals took the AHC exam and 19 took the AP exam. A total of 87 percent of AHC test takers have passed, and 95 percent of AP test takers have passed. To date, 82 applicants have taken the AHC exam (75 percent pass rate), and 43 applicants have taken the AP exam (98 percent pass rate).

NAMA welcomed 32 new Professional Members through NAMACB board certification during the current year. We now have 776 board certified AHC/CAP members.

Highlights of the year include the following:

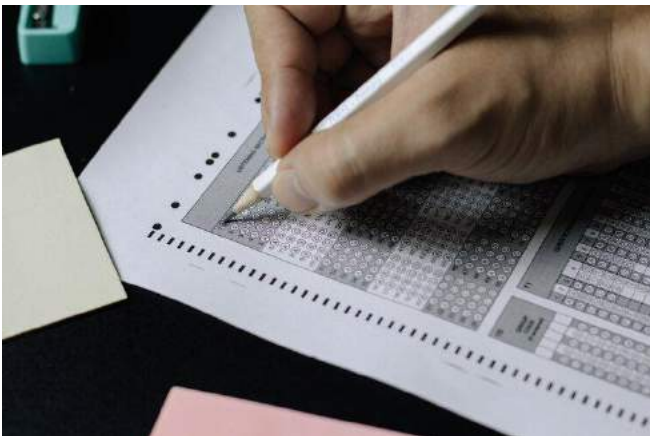
- Online proctoring became available for test takers on their home computers.
- A 20 percent discount on AHC and AP registration fees was offered due to Covid-19.
- The NAMACB Ethics and Disciplinary Review Panel was launched, and held its first meeting.
- AD Beta Exam Subcommittee was formed to specify qualifications for AD exam candidates, develop an AD exam application, and review applications for the exam.
- A 75 percent discount on registration for the certification exam was offered to qualified Ayurvedic school faculty.
- The AD beta exam was readied for summer 2021 launch.

- AD study and reference guides were completed.
- Presentations on the NAMACB and the importance of certification for the Ayurvedic profession were delivered at the Schools and Leadership Summit.
- Work on the NAMACB communications plan began.

Goals for the upcoming year include the following:

- Complete the AD beta exam process and launch the AD certification exam
- Support members' efforts to complete Continuing Education requirements for the 2020-2021 cycle (due December 2021)
- Continue to reach out to and foster a strong working relationship between NAMA-recognized schools and the NAMACB
- Explore novel ways to encourage Ayurveda graduates to take the appropriate board certification exams
- Finalize and implement the NAMACB communication plan

AD BETA EXAM SUBCOMMITTEE



The AD Beta Exam Subcommittee was formed this fiscal year to create and implement a process to determine eligibility of candidates seeking to take the Ayurvedic Doctor board-certification beta exam. In addition to creating an application, the Subcommittee will also support NAMACB staff in determining the eligibility of certain applicants' qualifications to sit for the exam on an as-needed basis. The Subcommittee has created an application checklist for this process to help staff identify

which supporting documents and criteria are necessary for each applicant. The application process and detailed prerequisites to sit for the exam are close to completion. The AD beta exam is scheduled to launch in the latter half of 2021.



LEGAL COMMITTEE REPORT

Chair: Hilary Garivaltis, CAP

Members: Maria DeSousa, JD; Susan Etheridge, JD, CAP, AYT; Mamta Landerman, CAP; Heather Baines, AD; David McConaghay, AD; Wynn Werner

Accomplishments

- Created a cooperation agreement between NAMA and state associations
- Designed a grant application for state associations in need of support for state legislative work
- Worked on disclosure agreement templates for state associations that each group can refine in accordance with their state laws

STATE ASSOCIATION SUBCOMMITTEE

Chair: Christina Vargas, CAP

Members: Hilary Garivaltis, CAP, Jolynne Flores

Attendees: Representatives from states with current groups or states forming new groups - open forum

Subcommittee met a few times during this fiscal year and is re-forming under a new Chair.

- Ayurvedic communities in five states (California, Colorado, Florida, Minnesota, and Wisconsin) have established nonprofit entities and are holding meetings.
- Efforts are underway in five states to set up associations and have progressed through various stages in the process.
- Associations in two states (Massachusetts and Wisconsin) are working to promote the passage of Safe Harbor bills in their legislative bodies.



NOMINATIONS AND ELECTIONS COMMITTEE REPORT



Chair: Jolynne Flores

Members: Heather Grzych, CAP; Dhanada Kulkarni, BAMS, AD

Candidates submitted paperwork in May and the election took place from July 1 through July 31, 2021. Four seats were open and three applications were submitted. The membership voted in Manas Kshirsagar, Monika Manohar, and Sina Farouzi for three-year terms. During each election cycle we have a minimum of four seats open. The NAMA board will determine if they will fill the fourth seat for a period of one year.

ETHICS COMMITTEE REPORT

Members:

May 1, 2020 - November 1, 2020: Arun Deva, Monica Groover, PhD, AD; and Margrit Mikulis, ND, AD

November 1, 2020 - May 1, 2021: Alakananda Ma, MBBS, AD; Dhaval Dhru, MD, AD; Wynn Werner

May 1, 2021 - November 1, 2021: Raja Sivamani, MD; Anupama Kizhakkeveettil, BAMS, PhD, MAOM, Lac, AD; Dhaval Dhru, MD, AD



This Committee oversees reviews of our Conflict of Interest and Duty of Loyalty forms for all Committee volunteers and board and staff members throughout the year and for all new board nominees and also adjudicates any complaints or grievances against NAMA members.



RESEARCH COMMITTEE REPORT

Chair: Raja Sivamani, MD

Members: Dinesh Gyawali, BAMS, AD; Diana Lurie, PhD, CAP; Shraddha Ravani, CAP; Anupama Kizhakkeveettil, BAMS, PhD, MAOM, Lac, AD; Priyanka Ingle, BAMS, MS, PhD, AD

Our Committee took time to restructure its goals this year and to integrate new members into the group. The Research Committee strives to accomplish four main goals:

- Raise awareness of research-based publications among NAMA members

- Publish and promote reviews of Ayurvedic research and primary Ayurvedic research in peer-reviewed journals
- Engage NAMA membership with interactive research summaries to keep them up to date on the latest developments in Ayurvedic medicine
- Recruit healthcare practitioners outside of Ayurveda to collaborate on the development of publications that demonstrate the integration of Ayurveda into the larger healthcare system

The Committee intends to promote Ayurveda and continue to both engage the membership with relevant topics of research and to attract more members that may see the value of research-backed approaches within Ayurveda. Furthermore, the intention of the Research Committee is to move Ayurveda toward greater credibility and ultimately promote scientific discourse in a responsible and credible manner.



NATIONAL AYURVEDIC MEDICAL ACCREDITATION COUNCIL (WORKING COMMITTEE UNDER NAMA) REPORT

Chair: Jim Ventresca

Members: Noreen Dillman, JD, CPA; Suhas Kshirsagar, BAMS, MD (Ayu), AD; Alakananda Ma, AD; Pratima Kumar Musburger, JD, MPH; Ram Rao, CAP; Jim Ventresca, DOM

Executive Director: Lisa Cavallaro, PsyD, C-IAYT

This year's accomplishments included a number of significant milestones in the evolution of NAMAC. The foundational work to ensure a successful start-up continued through the 2020-2021 fiscal year. The Council is poised to launch as a separate nonprofit organization in August 2021 and is finalizing its governance structure, accreditation standards, and policies and procedures. NAMAC is preparing to accept its initial accreditation applications in the fourth quarter of 2021. Two new board members were installed, and a new Executive Director hired in April 2021, furthering the Council's goal of establishing itself as a stable independent entity. Initial grant funding was secured and provided by NAMA and a four-year business plan looking to long-term sustainability is in development.

NAMA FUNDRAISING 2020/2021

Donation Total: \$13,000

Benefactor Level (\$5,000-\$9,999)

Shah Exploration and Education Foundation and
Amish and Puja Shah

Partner Level (\$1,000-\$4,999)

George and Hilary Garivaltis

Athena Garivaltis

Friend Level (\$25-\$999)

Rene Avenda

Carol Rich

Kaveri Datta

Colton Osborne

Dorothy Seeger

Breath Ayurveda and Susan's Kitchen

Amanda Deangelis

Genevieve Ryder

Hilary Garivaltis

Loribeth Cohen

Laurie Dan



Lisa Sack

Jolynne Flores

Heather Grzych

Leland Garivaltis

Samuel Garivaltis

Sandra Garivaltis

Hilary Ervin

Olivia Hudis

Rammohan Rao

Prajacta Evelind

THANK YOU!

