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HOUSE OF DELEGATES INFORMATION
# 2024 House of Delegates

**Robert C. Layman, O.D., Speaker of the House**

## Committees of the House of Delegates

### Credentials Committee
- **Matt S. Valdes, O.D., Chair**
  - San Antonio, TX
- **Randall J. Kempfer, O.D.**
  - Fergus Falls, MN
- **Tamami Candi Kimura, O.D.**
  - Yorba Linda, CA

### Nominating Committee
- **Harvey B. Richman, O.D., Chair**
  - Manasquan, NJ
- **Rachel L. Achenbach, O.D.**
  - Windham, ME
- **Robert S. Buckingham, O.D.**
  - Big Rapids, MI
- **Stacy A. Clark, O.D.**
  - Salina, KS
- **Howard R. Day, O.D.**
  - Gardendale, AL
- **Michael P. Rosenblatt, O.D.**
  - Washington, DC
- **Dean Barcelow, O.D.**
  - Bethel, VT
- **Angelique M. Sawyer, O.D.**
  - North Conway, NH
- **Jeffrey A. Sterling, O.D.**
  - Greenville, NC

### Resolutions Committee
- **Stephen M. Montaquila, O.D., Chair**
  - Warwick, RI
- **Joseph J. Allen, O.D.**
  - Sartell, MN
- **Nacondus Gamble, O.D.**
  - Pembroke, GA
- **Thomas W. Moore, O.D.**
  - Dunbar, WV
- **Jon F. Pederson, O.D.**
  - Centennial, CO
- **Maria S. Richman, O.D.**
  - Manasquan, NJ
- **Robert M. Theaker, O.D.**
  - Hollister, CA

### Sergeant-at-Arms Committee
- **Amanda R. Dellinger, O.D., Chair**
  - Rogersville, TN
- **Matthew R. Jones, O.D.**
  - Effingham, IL
- **Laura M. Suppa, O.D.**
  - South Charleston, WV
## Officers

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<td>President</td>
<td>Steven T. Reed, O.D.</td>
<td>Magee, MS</td>
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<td>Vice President</td>
<td>Jacquie M. Bowen, O.D.</td>
<td>Greeley, CO</td>
</tr>
<tr>
<td>Secretary-Treasurer</td>
<td>Teri K. Geist, O.D.</td>
<td>Omaha, NE</td>
</tr>
<tr>
<td>Immediate Past President</td>
<td>Robert C. Layman, O.D.</td>
<td>Toledo, OH</td>
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## Trustees

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<td>Terri A. Gossard, O.D., M.S.</td>
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<td>Curtis A. Ono, O.D.</td>
<td>Seattle, WA</td>
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<td>Belinda R. Starkey, O.D.</td>
<td>Rogers, AR</td>
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<tr>
<td>Marrie S. Read, O.D., MBA</td>
<td>Burke, VA</td>
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<tr>
<td>Paul M. Barney, O.D.</td>
<td>Anchorage, AK</td>
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<td>Tad R. Kosanovich, O.D.</td>
<td>Englewood, FL</td>
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## Staff

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<td>Alexandria, VA</td>
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THE OPTOMETRIC OATH

With full deliberation I freely and solemnly pledge that:

I affirm that the health of my patient will be my first consideration.

I will practice the art and science of optometry faithfully and conscientiously, and to the fullest scope of my competence.

I will uphold and honorably promote by example and action the highest standards, ethics and ideals of my chosen profession and the honor of the degree, Doctor of Optometry, which has been granted me.

I will provide professional care for the diverse populations who seek my services, with concern, with compassion and with due regard for their human rights and dignity.

I will work to expand access to quality care and improve health equity for all communities.

I will place the treatment of those who seek my care above personal gain and strive to see that none shall lack for proper care.

I will hold as privileged and inviolable all information entrusted to me in confidence by my patients.

I will advise my patients fully and honestly of all which may serve to restore, maintain or enhance their vision and general health.

I will strive continuously to broaden my knowledge and skills so that my patients may benefit from all new and efficacious means to enhance the care of human vision.

I will share information cordially and unselfishly with my fellow doctors of optometry and other professionals for the benefit of patients and the advancement of human knowledge and welfare.

I will do my utmost to serve my community, my country and humankind as a citizen as well as a doctor of optometry.

I hereby commit myself to be steadfast in the performance of this my solemn oath and obligation.

Last Revised June 2021
SUBJ:  2024 HOUSE OF DELEGATES

TO:    Presidents, Presidents-Elect and Secretaries of all AOA Affiliated Associations; Official Office of Each AOA Affiliated Association.

FROM:  Teri Geist, O.D., Secretary-Treasurer

DIST:  2024 House of Delegates Committees; AOA Board of Trustees; AOA General Counsel;

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House of Delegates Call

House of Delegates Information

Offices to be Filled by Election

Proposed Bylaws Amendment
March 18, 2024

To the Presidents and Secretaries of the Associations Affiliated with the American Optometric Association

In accordance with the Constitution and Bylaws of the American Optometric Association, the Board of Trustees has fixed June 20 – 22, 2024, as the date of the meeting in Nashville, TN where the 127th Annual Congress of the American Optometric Association will be held.

NOW, THEREFORE I, Ron Benner, O.D., on behalf of the Board of Trustees do hereby call a meeting of the House of Delegates of the American Optometric Association to be held at the Music City Center, Nashville, TN, on Thursday, June 20, 2024, to transact such business as may come before it.

*Important additional information*

Ron Benner, O.D.
President

ATTEST

Teri Geist, O.D.
Secretary-Treasurer
The 127th Annual Congress of the American Optometric Association is scheduled to be held June 20-22, 2024, at the Music City Center, Nashville, TN, with the first meeting of the House of Delegates called for Thursday, June 20, 2024. The Credentials Desk will open outside the House of Delegates room 30 minutes prior to the start of the House of Delegates each day.

CREDENTIALS

Credentialing materials to be completed and signed by the affiliated association president and secretary will be sent under separate cover. Once you receive them, please complete, and return the credentialing materials to the AOA St. Louis office no later than May 31, 2024, so that the secretary-treasurer and the Credentials Committee may examine and verify credentials of all delegates and alternates for the purpose of seating delegates.

Each affiliated association shall be entitled to one (1) delegate for each 50 of its members and optometric educator members, except that student, honorary, associate, or provisional members shall not be counted at all, and any members, except optometric educator members, who pay less than the full active member dues (not considering the reductions in dues permitted under Paragraphs C.8., F and G of Section 2 of Article I of these Bylaws) shall be counted as one-half (1/2) member. A member shall only be eligible to be counted in the foregoing calculation if the proper amount of dues owed by that member for all financial quarter periods ending not less than 60 days before the first day of the annual congress, and all prior periods, have been paid and received at this Association not more than 30 days (said 30 days to be deemed to be a grace period for submitting such dues) after the last business day of the last financial quarter ending not less than 60 days before the first day of the annual congress, which excludes any Saturday, Sunday, or Federal holiday (and such dues must be actually received by said date and not just be postmarked by said date); provided, however, that an affiliated association having less than 50 such members shall nonetheless be entitled to one (1) regular delegate. Any member who receives any dues waiver pursuant to the process described in Paragraph G of Section 2 of Article I of these Bylaws shall not be counted for credentialing purposes during the year following the year in which the waiver applied (Article II, Section 3).

VOTING

Each affiliated association shall be entitled to one (1) vote on any matter coming before the House for each ten (10) of its members and optometric educator members, except that student, honorary, associate or provisional members shall not be counted at all, and any members, except optometric educator members, who pay less than the full active member dues (not taking into account the reductions in dues permitted under Paragraphs C.8., F and G of Section 2 of Article I of these Bylaws) shall be counted as one-half (1/2) member. A member shall only be eligible to be counted in the foregoing calculation if the proper amount of dues owed by that member for the last quarter (as defined in Article II, Section 11) and all previous financial quarters have been paid and received (not merely postmarked) at this association by the credentialing deadline (as defined in Article II, Section 11). Any member who receives any dues waiver pursuant to the process described in Paragraph G of Section 2 of Article I of these Bylaws shall not be counted for credentialing purposes during the year following the year in which the waiver was applied. However, each affiliated association shall be entitled to at least one (1) vote. The voting strength of the delegations representing each affiliate association shall be determined from the records of this association as
of the last business day of the last quarter (as defined in Article II, Section 11). The delegation representing the student members shall be entitled to three (3) votes on any matter coming before the House. The total vote of each delegation may be cast by its delegate or delegates present when the vote is called.

RESOLUTIONS

All resolutions submitted by affiliated associations and delivered to the AOA secretary-treasurer at least 15 days prior to the first day of the annual congress are automatically submitted to the resolutions committee. (Any resolution not submitted at least 15 days prior to the first day of the congress shall require a two-thirds affirmative vote by the House in order to be received and referred to the resolutions committee.) Resolutions should be submitted in typewritten form, double-spaced, with source of origin of the resolution clearly indicated on the first page. Please refer to upcoming Resolutions Committee bulletins for more information.

DECEASED MEMBERS

During a session of the House of Delegates, tribute will be paid to all of our departed practitioners who were members of the American Optometric Association. You will receive from AOA Dues Accounting a list of AOA members who were affiliated through your association and who have passed away between the close of the most recent AOA Annual Congress and April 30, 2024. You will be asked to make corrections to the list and return it to AOA.

DELEGATE SEATING

The House of Delegates will be composed of delegates representing members of the affiliated associations. Past presidents, members of the AOA Board of Trustees, and the delegates representing sections are privileged to participate in all matters before the House but do not vote in such capacity.

An alternate delegate may be selected for each delegate. If a delegate is unable to attend the congress or is absent from a session of the House, the delegation may designate any of its alternate delegates to act in the place of the absent delegate. After being so designated, the alternate should inform the credentials desk, receive a delegate's ribbon, and then be seated with the delegation.

An electronic handbook designed to serve as a reference aid for those members who participate in meetings of the House of Delegates will be available in advance of the meeting. The parliamentarian also lends counsel to individual delegates and assists the speaker of the House as a source of information on parliamentary matters.

Should you have specific questions regarding these procedures, I will be happy to respond to them.

Sincerely,

Teri Geist, O.D.
Secretary-Treasurer
OFFICES TO BE FILLED BY ELECTION

March 18, 2024

TO: To the Presidents and Secretaries of
All Affiliated Associations

Pursuant to the guidelines governing nominating procedures leading to the election of officers and trustees for the American Optometric Association, I herewith advise you of the offices to be filled by election during the 127th Annual Congress of the Association in Nashville, TN, June 20 – 22, 2024.

The offices are as follows:

President-Elect
Vice President
Secretary-Treasurer
Two Trustees – Three-year term
One Trustee – Two-year term

Sincerely,

Teri Geist, O.D.
Secretary-Treasurer
CLARIFICATION: OFFICES TO BE FILLED BY ELECTION

I would like to clarify the reference to the “Offices to be Filled by Election” that is referenced in Bulletin No.1, Volume 82, dated March 20, 2024.

In addition to the office of President-Elect, Vice President, and Secretary-Treasurer, there are currently two three-year trustee positions that will be filled by election during the 127th Annual Congress of the American Optometric Association. Currently, Paul Barney, O.D. and Tad Kosanovich, O.D. hold trustee positions with terms that expire this year. Both of these doctors have announced their candidacy to seek re-election for trustee positions. Karoline Munson, O.D., of Kentucky and Bob Theaker, O.D. of California, have also announced their candidacy to seek election for a Trustee position.

Terri Gossard, O.D., who is currently serving a three-year Trustee office, with that term to expire in 2024 has announced her candidacy for Secretary-Treasurer. It is only after the Secretary-Treasurer election has taken place in Nashville and assuming that Dr. Gossard has been elected as Secretary-Treasurer, that the office for the two-year unexpired term will become vacant.

Sincerely,

Teri Geist O.D.
Secretary-Treasurer
PROPOSED BYLAWS AMENDMENT #1
ARTICLE I, MEMBERSHIP

Article 1, Section 1, Paragraph C:

“4. Optometric Educator Members. An optometrist meeting the qualifications set forth in Article I, Section 1, Paragraph A who is either (i) a full-time educator primarily engaged in school related activities such as teaching, research and administration at a school or college in the United States, accredited or pre-accredited by the Accreditation Council on Optometric Education; or (ii) a full-time researcher or educator employed by an academic medical center that is not eligible for ACOE accreditation; and who is directly compensated by such school or college shall be eligible for classification as an Optometric Educator Member of this Association.

“Such optometric educator members are permitted to engage in the practice of optometry providing direct care to patients for no more than 16 (sixteen) hours per week.”

EXPLANATION:

- This proposed amendment provides educator status to OD researchers and educators at non-optometry institutions.
- This amendment will take effect immediately upon passage.

NOTE: Wording to be deleted lined out. Wording to be added underscored.

Submitted by: Oregon Association of Optometric Physicians
HOUSE OF DELEGATES
PROCEDURES
2024 HOUSE OF DELEGATES PROCEDURES

The AOA House of Delegates is in session from the opening gavel until adjournment sine die, and the Speaker can call the House into session at any time.

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GENERAL INFORMATION

The handbook includes a copy of the agenda, the current Constitution and Bylaws, any proposed amendments, Summaries of Actions of the Board of Trustees, financial report, reports of AOA and AOA-related entities, and reports of other optometric organizations.

The House Procedures are designed to serve as a reference aid for the meetings of the House of Delegates. As a guide of procedural rules, this handbook assists the Speaker and the delegates in the determination of the will of the House, providing an interpretative clarification concerning matters not specifically treated in the AOA Constitution and Bylaws. The Speaker’s rulings are subject to appeal to the House, which makes the final decision on any question. For additional information, consult the AOA Constitution and Bylaws and Robert’s Rules of Order Newly Revised 12th Edition, which control the proceedings of the House. (Article II, Section 6.C. of the Bylaws.)

The House of Delegates is the legislative and policy-making body of the American Optometric Association and is the supreme authority of the AOA. (Article II, Section 9.D. of the Bylaws.) It is composed of delegates representing members of the affiliated associations.

Distinguished members (past presidents) of this Association and current members of the Board of Trustees are ex officio delegates. As such, they may attend sessions of the House and shall be entitled to participate in debate and to make motions but are not entitled to vote unless they are certified as delegates representing an affiliated association.

Each delegate representing a section is entitled to participate in debate and make motions but not vote.

Any requests for the list of delegates/alternates of the House of Delegates shall not be granted because of the possible revisions to this list during the entire Congress.

CREDENTIALS

Credentials of the delegates and alternates must be received by the Secretary-Treasurer of the AOA not later than fifteen (15) days prior to the first day of the Annual Congress. (Article II, Section 3.A.4. of the Bylaws.)

CREDENTIALS COMMITTEE – AUTHORITY

The authority for the establishment of this committee is Article II, Section 4 of the Bylaws:

Credentials Committee

No later than thirty (30) days before each annual congress, the president shall appoint a credentials committee composed of at least three (3) members. The credentials committee
shall verify the credentials of all delegates to the congress and report to the congress for the purpose of seating the delegates and their alternates. Any dispute as to the number of delegates to which an affiliate is entitled or as to which delegates or alternate delegates are eligible to serve as delegates or alternate delegates shall be determined by the Credentials Committee, whose decision shall be final and not appealable.

RESPONSIBILITIES & GUIDELINES

1. Throughout the sessions of the House of Delegates, a credentials table will be maintained by members of the committee. All committee members should be present a reasonable time before each session of the House convenes.

2. It is suggested that the Credentials Committee be present prior to the opening of the House for the purpose of examining and verifying credentials of all delegates and alternates. This will expedite the seating in the House of Delegates.

3. All credentials forms are examined in accordance with the Bylaws and the AOA Membership Department count to determine the number of authorized delegates and alternates to which each delegate group is entitled. (Article II, Section 3.A.2. of the Bylaws.)

4. Each delegate group (except the student members) is entitled to one (1) delegate for each fifty (50) paid-up members, excluding student, honorary, and associate members as certified to the AOA Secretary-Treasurer. Except for optometric educator members, members who pay less than their full active member dues are counted as one-half member. The delegate strength of each delegate group for the Annual Congress shall be determined from the records on April 30 unless that date is a Saturday, Sunday, or Federal holiday. (Article II, Section 3.A.1. and 2. and Section 11. of the Bylaws.)

   The student members at each school or college in the United States accredited or pre-accredited by the Accreditation Council on Optometric Education are entitled to one (1) delegate and alternate, and the affiliated association representing the student members is entitled to three (3) delegates and alternates. (Article II, Section 3.B.1. and 2. of the Bylaws.)

5. When verified by the Credentials Committee, each delegate group will receive the appropriate number of ribbons for the delegates and alternates.

6. Seating in the delegate area of the House of Delegates itself is reserved for certified delegates representing members of the affiliated associations, distinguished members, the Board of Trustees, and section delegates. Alternates are to be seated in the area reserved for alternates. The Sergeants-At-Arms are responsible for monitoring the proper seating.

7. The Credentials Committee shall report to the House periodically.
An appropriate initial motion is:

“Mr. Speaker, as a delegate, and on behalf of the Credentials Committee, I move that all certified delegates as recorded be seated.”

Supplementary reports shall be given as needed during subsequent business sessions.

An appropriate subsequent motion is:

“Mr. Speaker, as a delegate, and on behalf of the Credentials Committee, I move that the revised listing of delegates as recorded be the official delegate roll of this House.”

NOTE: A motion made on behalf of a committee does not require a second. (Roberts, p. 31.)

8. The Credentials Committee Chair shall call the roll for roll call votes. The other members of the Credentials Committee shall tally the votes on roll calls in the House of Delegates. Official results of a vote are announced by the Speaker.

Each affiliated association (except for the association of student members) is entitled to one (1) vote for each ten (10) paid-up members, excluding student, honorary, and associate members as certified to the AOA Secretary-Treasurer. Except for optometric educator members, members whose dues are less than their full active member dues are counted as one-half member. (Article II, Section 5.A. of the Bylaws.)

The delegation representing the student members shall be entitled to three (3) votes on any matter coming before the House. (Article II, Section 5.A. of the Bylaws.)

9. The final action of the committee shall be to give written comments to the Speaker of the House evaluating the effectiveness of the committee and making recommendations for changes in these guidelines.

All members of the Credentials Committee must be listed as either a delegate or alternate from their respective affiliate.

SPEAKER OF THE HOUSE

The President may preside at the House of Delegates or a member may be designated by the President to preside as Speaker of the House. A Past President, because of past experiences and knowledge of the Association, is a logical choice to serve as Speaker. It is the obligation of the Speaker to sense the will of the House, to preside accordingly, and to hold the rulings ever subject to challenge from, and reversal by, the House.
PARLIAMENTARY PROCEDURE (ROBERT’S RULES OF ORDER)


QUORUM

Certified delegates representing a majority (27 of 53) of the affiliated associations shall constitute a quorum for the transaction of business at any session of the House of Delegates. (Article II, Section 6.A. of the Bylaws.)

MAJORITY

A majority is one vote more than half of the votes cast, a quorum being present. (Robert’s, §44:1)

ENTRANCE TO THE HOUSE CHAMBER

Entrance to the AOA House of Delegates Chamber is limited to delegates and other persons presenting proper credentials. By virtue of their membership, all members of the AOA are entitled to observe sessions of the House of Delegates. Non-members and guests may enter at the pleasure of the Speaker or the House.

ORDER AND DECORUM

Order and decorum will be maintained in the House by the Speaker with the assistance of the Sergeants-At-Arms. It shall be the responsibility of the Sergeants-At-Arms to monitor access to the delegates’ areas of the House of Delegates and to assure that the delegates are properly seated. Other areas are provided for the seating of alternates, members, staff, representatives of other organizations, press and guests.

When the House of Delegates is in session, individuals wishing to conduct personal business are requested to step out of the House Chamber. To preserve the decorum of the House, no audio or video recordings are allowed, except for ceremonial events, as authorized by the Speaker.

SERGEANTS-AT-ARMS

The Sergeants-At-Arms shall assure that all individuals admitted to the House area present proper credentials and are seated in the proper areas for delegates, alternates, members, staff, representatives of other organizations, press and guests. All members of the Sergeant-At-Arms Committee must be listed as either a delegate or alternate from their respective affiliate.

SEATING OF THE DELEGATES

Only individuals who are properly certified to the Secretary-Treasurer and whose credentials have been verified by the Credentials Committee may be seated as delegates or alternates. Delegates
who have been certified will receive the appropriate ribbon and must wear it in order to be seated in the House of Delegates. Each delegate group may select one alternate for each delegate.

Seating in the delegate area of the House of Delegates is reserved for certified delegates representing members of the affiliated associations, sections, distinguished members (past presidents) and the Board of Trustees. The Executive Director may be seated near the Board of Trustees. If required due to occupancy limitation, seats will be allocated to all delegations proportionate to the relative size of their delegations.

If a seat within a delegation is unoccupied by a delegate, an alternate from that group may be certified and then seated in the delegate’s place. Arrival of a delegate, who has priority, will necessitate an alternate leaving the delegates’ area. Affiliate association delegations will be responsible for determining which of their own delegates will be granted a seat when there are not enough seats available for all of the affiliate’s delegates who would like to attend a session of the House of Delegates.

A staff table is provided for other AOA staff. They are admitted by a staff badge.

A press table is provided for the optometric press. They are admitted by a press badge.

Additional seating is provided outside the delegates’ area for alternates, members, representatives of other organizations and guests.

NOTE: The House of Delegates may authorize the seating of the executive directors of affiliated associations with their delegations in the House of Delegates area.

PRIVILEGES OF NON-DELEGATES

A delegate may request permission for a non-delegate member of the American Optometric Association to address the House of Delegates (Article II, Section 5.E. of the Bylaws.). If permission is granted by the Speaker, the member must confine any remarks to the specific matter under consideration and debate. A similar request may also be made on behalf of a guest by an officer of this Association. Also, the Speaker may permit a member or guest to address the House.

NON-PUBLIC SESSION

During a Non-Public Session, only Delegates, AOA Board of Trustees, AOA Past Presidents, Alternates, Other AOA Member doctors of optometry, AOA Executive Director, AOA Legal Counsel, AOA Staff, and Executive Directors of Affiliated Associations will be permitted to attend.

ACCESS TO THE FLOOR

Subject to restrictions on the total number of delegates allowed in the room at one time due to COVID-19 pandemic occupancy limitations, each delegate shall be entitled to the privileges of the floor and to participate in debates on any matters coming before the House.
A delegate wishing to secure the floor shall go to the nearest microphone and address the Speaker. The Speaker will acknowledge the person by identifying the microphone position. The delegate must then clearly announce his or her name and the delegate group represented. The Speaker shall repeat the name and the delegate group before the delegate may proceed.

**DISCUSSION, DEBATE AND AMENDMENTS**

In order to facilitate discussion and debate, wherever possible, written copies of any lengthy or complicated amendment(s) should be provided to the Speaker before the motion sought to be amended is considered by the House.

**RESOLUTIONS COMMITTEE**

The Resolutions Committee is authorized to begin on-site deliberations two days in advance of the convening of the House, depending on the number of resolutions submitted. It may begin deliberating off-site at its discretion at any time.

**AUTHORITY**

The authority for the establishment of the Resolutions Committees is in Article II, Section 8 of the Bylaws:

Resolutions Committee

A. The president shall, no later than sixty (60) days prior to the first day of the annual congress, appoint one (1) or more resolutions committees as the president may deem necessary or appropriate. Each committee shall be composed of at least five (5) members of this Association, one (1) of whom shall be designated as chair by the president.

B. Each resolutions committee shall consider such proposed resolutions as may be referred to it in accordance with subparagraph C of this section and shall report to the House of Delegates those resolutions which it has approved either in the form referred to it or as modified or changed by the committee. If the committee makes significant substantive modifications or changes to a resolution, it shall consult the originator prior to reporting the resolution to the House of Delegates.

C. Resolutions may be proposed by an affiliated association, by a section, by the House of Delegates, or by the Board of Trustees. An affiliated association or section shall deliver to the secretary-treasurer, at least fifteen (15) days prior to the first day of the annual congress, one (1) typewritten copy of all resolutions which such affiliated association or section proposes for adoption by the House of Delegates, and the secretary-treasurer shall deliver one (1) copy thereof to the chair of the appropriate resolutions committee. The Board of Trustees may at any time submit a proposed resolution to the secretary-treasurer who shall refer it to an appropriate resolutions committee, and the House of Delegates by
a two-thirds (2/3) vote may similarly do so. Proposed resolutions which have not been referred to an appropriate resolutions committee in accordance with the provisions of this subparagraph shall not be considered by the House of Delegates.

D. Each resolutions committee shall report to the House of Delegates all proposed resolutions which it has approved, and a copy of each such proposed resolution, as approved by the committee, shall be made available to each delegate at least four (4) hours prior to its consideration by the House of Delegates. In the event that a resolutions committee does not report to the House of Delegates with approval a proposed resolution that has been referred to it, any delegate may, at the appropriate time, offer, from the floor, a motion that the House consider the proposed resolution, and if the House of Delegates shall approve the motion by a two-thirds (2/3) vote, the House of Delegates shall thereupon give consideration to the proposed resolution.

GUIDELINES

Pre-Congress Activities

a. It is suggested that each committee member should be aware of the Judicial Council actions on the resolutions of the previous year including any resolutions referred back to the House of Delegates by the Judicial Council.

b. Appointment of the committee in advance of the Congress is made by the President of AOA in order to provide time for familiarization with proposed issues. Each committee member should thoroughly review and become familiar with any materials provided.

c. Copies of the extant (current) resolutions passed by the House of Delegates are available through the Resolutions Committee staff.

d. If a stand-alone meeting is required and approved, the regular AOA reimbursement policies will apply (these expenses will be charged to the House of Delegates’ budget).

RESOLUTIONS

All resolutions properly submitted and delivered to the AOA Secretary-Treasurer at least fifteen (15) days prior to the first day of the Annual Congress are automatically referred to the appropriate resolutions committee. (Article II, Section 8.C. of the Bylaws.)

Resolutions should be submitted in typewritten form, double-spaced, with source of origin of the resolution clearly indicated on the first page.

Any resolution, except those submitted by the Board of Trustees, which is not received at least fifteen (15) days prior to the first day of the Congress shall require a two-thirds (2/3)
affirmative vote by the House in order to be referred to the resolutions committee. (Article II, Section 8.C. of the Bylaws.)

The Resolutions Committee shall send a bulletin to Affiliates including all submitted resolutions no less then 10 days prior to the opening of House of Delegates.

In accordance with Article II, Section 8.C. of the Bylaws of the Association, a resolutions committee may not initiate resolutions on its own. The committee has the discretion, however, to modify or change a resolution in an appropriate manner. Any significant or substantive modification shall be brought to the attention of the entity which introduced the resolution, prior to the report to the House. (Article II, Section 8.B. of the Bylaws.)

Resolutions approved by a resolutions committee shall be reported to the House of Delegates at least four (4) hours prior to its consideration. (Article II, Section 8.D. of the Bylaws.) Those not approved need not be reported, but the entity which introduced the resolution should be informed. After consultation with the Secretary-Treasurer, the report should include the financial implications, if any, of the proposed resolution.

NOTE: A motion made on behalf of a committee does not require a second. (Robert’s, p. 36.)

However, if the committee fails to approve and report any resolution submitted to it, any delegate has the right to make a motion from the floor to request that the House consider the resolution. If the House by 2/3 vote approves the motion, the resolution then will be considered by the House. (Article II, Section 8.D. of the Bylaws.)

Information on Proposing Resolutions and the Process is on page 24.

RESPONSIBILITIES AT CONGRESS

1. Chair:

   a. The chair may call a meeting of the committee to be held one or two days prior to the first official day of the House.

   b. The chair shall set the time schedule for the advance committee meetings at the Congress, as well as the time schedule for the committee meetings during the Congress. The chair shall consult with the House of Delegates staff on the setting of this time schedule to coordinate with the Congress schedule.

   c. The chair of the Resolutions Committee shall make reports to the House of Delegates. The chair will be notified by the Speaker as to when these reports are expected. The first report should include a listing of those resolutions being considered by the committee and introduction of the committee members and staff.

   d. The chair shall establish a schedule of “hearing times” and of “appearances” with the Resolutions Committee for the benefit of anyone interested in contributing to the deliberations of the committee on any resolutions being considered by it. This
schedule shall be announced to the House of Delegates. The chair shall request the
Resolutions Committee staff to make arrangements for posting the schedule of such
meetings or notifying the parties directly.

e. The Resolutions Committee staff shall obtain AOA legal counsel review of each
resolution before the resolution is presented to the House of Delegates.

f. An appropriate number of copies of resolutions to be presented to the House of
Delegates will be placed in the delegates’ boxes or distributed electronically.

g. The chair shall present all recommendations from the Resolutions Committee to the
House of Delegates at the times designated by the Speaker.

2. Committee Members:

a. Committee members should attend all meetings of the committee, including
meetings prior to the official opening of the House.

b. The final action of the committee should be to give written recommendations to the
chair evaluating the effectiveness of the committee and making recommendations
for changes in procedure.

All members of the Resolutions Committee must be listed as either a delegate or alternate from
their respective affiliate.

SPECIAL COMMITTEES OF THE HOUSE

The House or the Speaker may, when appropriate, appoint special committees of the House of
Delegates. (Article II, Section 9.C. of the Bylaws.) A special committee may hold an open hearing
for interested delegates, at which time the chair shall preside. Following the open hearing, the
committee shall then retire and deliberate.

Reports of a special committee are presented to the House by the chair, unless the Speaker directs
otherwise.

NOMINATING COMMITTEE

AUTHORITY

The authority for the establishment of this committee is in Article II, Section 7 of the
Bylaws:

Nominating Committee

A. There shall be a nominating committee composed of nine (9) members of this
Association, one (1) of whom shall have served the previous year and shall be
designated as chair. No affiliated association shall be represented on the nominating committee more often than once every two (2) years, provided, however, that in any year, one (1) member of the nominating committee of the previous year shall have been elected by that committee as chair for the next year. The nominating committee shall also select two alternates to serve in the event the new chair is unable to serve for the next year. The election for the next year’s chair and alternates shall be the last action of the nominating committee for each year. No affiliated association shall have more than one (1) member on the nominating committee at the same time. Any affiliated association with a candidate for an officer or trustee position shall not be represented on the nominating committee.

The names of eight (8) affiliated associations, other than that of the member of the previous year, shall be randomly selected in the manner determined by the House of Delegates. The names of eight (8) additional affiliated associations shall then be randomly selected in a similar manner as alternates for the eight (8) affiliated associations originally selected.

No later than January 1st of each year, the president of each of the eight (8) affiliated associations originally selected and the president of each of the eight (8) additional affiliated associations shall notify the Secretary-Treasurer of this Association in writing the name of the member selected by such affiliated association to serve as a member or alternate member of the nominating committee. After such notification, if such an individual is unable to serve, an individual from an affiliated association selected as an alternate, in order of such selection, shall replace the individual unable to serve.

RECOMMENDED GUIDELINES CONSISTENT WITH BYLAWS:

The Nominating Committee should have committee members in place early enough to allow for communication to discuss the process, review the candidates’ questionnaires, and evaluate the need for recruitment of candidates when appropriate.

Article II, Section 7 of the Bylaws:

B. The nominating committee shall prepare a slate of nominees for election to office in this Association which it shall present to the House of Delegates no later than forty-eight (48) hours prior to the election. The report of the nominating committee shall not preclude any delegate from making a nomination for any office from the floor of the House of Delegates.
RECOMMENDED GUIDELINES CONSISTENT WITH BYLAWS:

A “single” slate is defined as a nominee for each office. A “multiple” slate is defined as more than one nominee for each office. The AOA Bylaws allow the Nominating Committee to use either of these methods to submit a “slate” to the House of Delegates. The decision regarding which option will be used is at the discretion of the Nominating Committee. The Nominating Committee may also decide to use a combination of these methods, such as submitting one name for each of the officer positions and multiple names for the trustee positions.

GUIDELINES

1. Each affiliated association shall be notified at least ninety (90) days prior to the Annual Congress of the offices to be filled by election during the Congress.

2. No person shall be appointed to the Nominating Committee from a delegate group with an announced candidate.

3. For proper consideration by the Nominating Committee, written notifications of candidacies by or on behalf of candidates should be received by the Secretary-Treasurer at least thirty (30) days prior to the Congress. The Secretary-Treasurer shall notify the members of the nominating committee and the Board of Trustees of all such candidacies. Candidates are also encouraged to make their qualifications known to the delegate groups prior to the Congress.

4. The Nominating Committee is required to consider those candidates who have met the above recommendations and who have completed and timely returned any preliminary questionnaire submitted by the nominating committee. The Nominating Committee has the prerogative to seek additional candidates if it desires.

5. Any delegate has the right to make a nomination for any office from the floor, without meeting the above recommendations. A “second” to such nomination, while not required, is permitted. (Robert’s, §46:6)

6. Each candidate for office shall be invited to appear before the House of Delegates prior to the election at a time certain as established by the Speaker. Each candidate shall address the House for three minutes.

RESPONSIBILITIES

The Chair of the Nominating Committee should submit an appropriate preliminary questionnaire to each reported candidate, which reply should be received by the chair no later
than fifteen (15) days prior to the Congress. Immediately upon receipt, the chair shall distribute all such responses to the committee.

At the Congress, the chair shall:

1. Ensure the committee conducts meetings and personal interviews enabling the committee to present a slate of nominees.

2. Preside over all committee meetings.

3. Prepare and post the appointment schedule in a conspicuous place outside its meeting room and electronically.

4. Contact the members of the Board of Trustees and other delegates as deemed appropriate and invite them to express their views before the committee, if they so desire.

5. In the opening remarks to the committee, clearly state to the members that it is absolutely imperative that all comments and deliberations of the committee be kept in absolute confidence. Emphasis placed on the confidential nature of the meetings will remove any hesitancy to bring out information which could have important bearing on ultimate decisions. The chair should also encourage candid answers to the straightforward line of questioning of those being interviewed and assuring them that their answers will be kept in strict confidence by the committee. The confidentiality of the committee interviews and deliberations shall be continued even after the announcement of the slate and the conduct of the election. Each member of the Nominating Committee shall be required to sign a confidentiality agreement before he/she will be permitted to serve on the Nominating Committee.

6. The committee’s principal obligation is to select candidates based on personal qualifications, demonstrated achievements, potential for service to the profession without consideration of political, regional, personal or other influences.

7. Encourage the committee to obtain all appropriate information necessary to determine the qualifications of a candidate. If some question has arisen during the course of an interview, it may be necessary to interview some candidates more than once. It is improper for the committee to discuss personalities or capabilities of candidates with any member of the staff. Staff members shall only assist in making meeting room arrangements and other non-partisan activities and shall not be involved in the decision-making process of the Nominating Committee in any way.

8. When the interviewing process has been completed, the committee should review the entire course of deliberation to determine if there has been any item which needs further attention. If not, the committee should enter into a voting process to determine the slate.

When the slate has been determined, the chair shall personally take a copy to the Speaker and thereafter post a copy on the HOD bulletin board and/or on the door of the meeting room and electronically.
Such report must be presented “to the House of Delegates no later than 48 hours prior to the election,” as provided for in Article II, Section 7.B. of the Bylaws.

9. The Nominating Committee recognizes the importance of disseminating information about each candidate for the AOA Board of Trustees to the AOA House of Delegates. It will be the responsibility of the Nominating Committee to provide the affiliates with as much information as possible regarding the candidate’s qualifications and experience in advance of the election. Therefore, following the Report of the Nominating Committee to the AOA House of Delegates, a copy of each candidate’s questionnaire and curriculum vitae will be distributed to each affiliate via the delegate mailboxes and/or electronically.

10. Obtain from the committee members their written recommendations evaluating the effectiveness of the process, making recommendations deemed appropriate, which the chair should submit with the committee’s report to the Speaker and the Board of Trustees.

11. As a final action of the committee, elect a member as the chair of the Nominating Committee for the following year and a first and second alternate. (Article II, Section 7.A. of the Bylaws.)

MANDATORY CANDIDATE QUESTIONNAIRE QUESTIONS

In an effort to be consistent each year in gathering information from the candidates, the following questions must always be included on the Candidate Questionnaire:

1. Where is the candidate licensed and what work experience has the candidate had as an optometrist?
2. What experience has the candidate had as an AOA volunteer and for how long? List all positions held in the AOA.
3. What experience has the candidate had in service with an AOA affiliate and for how long? List all positions held in an AOA affiliate.
4. Has the candidate completed the required candidate’s disclosure statement and has the committee received a copy of that statement to review?
5. Each candidate will be required to submit curriculum vitae along with his/her questionnaire.

NOMINATIONS

A candidate for election to office shall be permitted the opportunity to have one nominating speech, not to exceed three (3) minutes in length, and one seconder. The presentation of a slate of nominees by the Nominating Committee made in accordance with Article II, Section 7.B. of the Bylaws, shall not constitute a nominating speech for any candidate so presented.
VOTING

The Credentials Committee Chair shall call the roll for roll call votes. The other members of the Credentials Committee shall tally the votes on roll calls in the House of Delegates. Official results of a vote are announced by the Speaker.

Each affiliated association (except for the association of student members) is entitled to one (1) vote for each ten (10) paid-up members, excluding student, honorary, and associate members as certified to the AOA Secretary-Treasurer. Except for optometric educator members, members whose dues are less than their full active member dues are counted as one-half member. (Article II, Section 5.A. of the Bylaws.)

The delegation representing the student members shall be entitled to three (3) votes on any matter coming before the House. (Article II, Section 5.A. of the Bylaws.)

The total vote of each delegation may be cast by its delegate or delegates present when the vote is called.

The method of voting in the House of Delegates is determined by the Speaker of the House. The speaker may call for a voice vote or a roll call vote.

Except as otherwise required by statute, the Constitution and Bylaws or by Robert’s Rules of Order Newly Revised 12th Edition, no action can be taken by the House of Delegates except upon a majority of the vote cast, a quorum being present. (Article II, Sections 6.B. and C. of the Bylaws.)

Voice Vote: The Speaker of the House determines the result of the vote by the volume of voices. If a delegate feels the vote was reported incorrectly by the Speaker, the delegate may request a roll call vote.

Roll Call Vote: The roll call vote is utilized when the voice vote is inconclusive. The Speaker may order a roll call vote on any issue, or a roll call vote shall be directed upon the request from delegates of five affiliated associations. The Credentials Committee Chair will call the roll. Roll call votes are used in contested elections. Article II, Section 6.D. of the Bylaws provides that “Whenever a vote is to be taken by roll call, the order of such voting shall be on an alphabetical basis beginning from a randomly selected affiliated association in the manner determined by the House of Delegates.” Thus, before each roll call vote, the Credentials Committee Chair shall determine the order of the vote by randomly drawing by lot the name of the affiliated association that will be called first.

ELECTIONS

To be elected, a candidate must receive a majority of the votes cast for the office, a quorum being present.

As provided in Article III, Section 1.E. of the Bylaws, in any election where there is more than one office of trustee open for the same term, each delegation shall have the right and obligation to cast a total vote, consisting of the regular voting strength, multiplied by the number of offices of
trustee open. However, no single candidate may receive a vote greater than the regular voting strength.

Pursuant to Article III, Section 1.D. of the Bylaws, the balloting in the House for terms having different lengths shall be conducted separately, beginning in the order of the longest duration of the term of office.

NOTE: Robert’s Rules of Order Newly Revised 12th Edition (at page 419) does not permit consideration of a motion to drop from the balloting the candidate(s) receiving the fewest number of votes.

Information on the Election Sequence is on page 22.

**CLARIFICATION OF TRUSTEE ELECTION PROCEDURE**

Because Article III, Section 1.E. of the AOA Bylaws requires that balloting for the two trusteeships be conducted at the same time with the regular vote count doubled, where there are more than two candidates, the “majority” (in accordance with Article II, Section 6.B. and C. of the Bylaws) amount needed for election to a trusteeship position shall generally be a majority of the amount of votes available to any one candidate (the regular vote count as cast).

Where only one candidate receives a majority of the regular vote count cast in the election, that candidate shall be declared elected to a trusteeship position.

Where only two candidates receive a majority of the regular vote count cast in the election, those candidates shall be declared elected to two trusteeship positions.

Where three candidates each receive a majority of the regular vote count cast in the election-a mathematical possibility, but a result which cannot yield a valid election-then the candidate receiving the largest number of votes shall be declared elected to a trusteeship position, and the two other candidates who received a majority of the regular vote count cast in the election shall compete in a “runoff” election where the vote count shall revert to the regular amount.

**AMENDMENTS TO THE CONSTITUTION AND BYLAWS**

The Constitution and the Bylaws of the American Optometric Association may be amended by two-thirds (2/3) of the votes cast at any annual or special congress in accordance with the procedures set forth in Article VI of the Constitution and in Article IX of the Bylaws.

Proposed amendments may be submitted by affiliated associations to the Secretary-Treasurer not later than one hundred (100) days before the House convenes. Amendments are distributed to the affiliated associations at least ninety (90) days prior to consideration by the House. (Article VI of the Constitution; Article IX of the Bylaws.)

Information on Amending the Constitution and Bylaws is on page 24.
AGENDA

The agenda lists the specific items to be considered by the House. Its purpose is to provide a systematic plan so that items of business may be considered carefully and handled expeditiously. The agenda and the established order of business can be revised or suspended by the Speaker or by the House.

Items generally included on the agenda are as follows:

- Call to Order
- Reports of the Credentials Committee
- Organization of House of Delegates: Adoption of Agenda, Adoption of the Handbook for Delegates as a guide of procedural rules, Seating of the Executive Directors of the Affiliated Associations, Ratification of Actions of the Board of Trustees
- Report of the Nominating Committee
- Reports of the Resolutions Committee
- Report of the American Optometric Association President
- Report of the American Optometric Student Association President
- Report of the Executive Director
- Reports of the Secretary-Treasurer
- Consideration of Constitution and Bylaws Amendments
- Report on Congress Geographical Location Selection
- Recognition of Special Guests
- Calls for Substantive Motions (New Business)
- Presidential Inaugural Address
- Election of Officers and Trustees
- Good and Welfare
- Adjournment

Questions relating to the priority of business shall be decided by the Speaker with the consent of the House or upon action by a majority vote of the House.
TIME CERTAIN

Although all items on the agenda are important to the operation of the Association, some items are scheduled for a time certain.

“Time Certain” is a fixed time for a special item of business, report, or presentation. The Speaker may suspend any other business under discussion to observe a time certain.

OPEN FORUMS

One or more open forums may be conducted during the Annual Congress. The forums are scheduled for a time certain and usually follow the formal recessing of the House of Delegates. An open forum offers an opportunity for the members of the House, without the formality of parliamentary procedure, to discuss major issues that are before the profession. The President of the Association may preside or may appoint another member to preside. No substantive motions can be made during open forums.

SUBSTANTIVE MOTIONS (NEW BUSINESS)

A call shall be made for the introduction of substantive motions each day prior to the last day of the House session. In order to facilitate discussion and debate, written copies of any substantive motion should be provided to the Speaker before the substantive motion is introduced. No substantive motions can be made on the last day of the House session.

Information on Proposing Substantive Motions and the Process is on page 24.

LETTERS OF APPRECIATION

The House of Delegates may direct that Letters of Appreciation (formerly “Thank You” resolutions) be sent by the Secretary-Treasurer on non-controversial matters, such as to note important anniversaries, to acknowledge outstanding accomplishments and to express appreciation upon retirements. Any requests for such letters shall be submitted in writing to the Speaker to review for presentation to the House. If approved by the Speaker as being non-controversial, and as not expressing a policy of the Association, the Speaker will set a time for this request to be made during a Good and Welfare agenda item. After due presentation of information and the request (no motion is necessary), the Speaker, without calling for a vote, declares the referral to the Secretary/Treasurer: “So ordered.”

GOOD AND WELFARE

Good and Welfare comes just before recess or adjournment and provides an opportunity for delegates to make comments or announcements, but no substantive motions can be made.

DISTRIBUTION OF MATERIALS
No printed matter such as pamphlets, charts, notes, etc., shall be distributed to the delegates in the House chamber unless permission has been first obtained from the Speaker of the House.

All campaign literature and other promotional materials should be placed in the designated areas outside the House entrance.

**AOA POLICY**

Any delegate wishing to review existing policy on any subject should contact AOA staff for assistance.

**ANNOUNCEMENTS AND INFORMATION**

Announcements and information, such as additional names of deceased members for inclusion in the Minutes, should be given, in writing, to the Speaker or to the staff at the staff table in the House of Delegates or in the House office when the House is not in session.

**ASSISTANT TO THE SPEAKER**

An AOA staff member is assigned by the Executive Director to assist the Speaker in developing the agenda and maintaining the schedule to help assure an efficient reporting and decision-making process in the House of Delegates.

**PARLIAMENTARIAN**

In advance of, and during the sessions of the House, the Parliamentarian serves as an aide to the Speaker of the House as a source of information on parliamentary matters. The Parliamentarian is also available to provide assistance to individual delegates regarding parliamentary procedure.

**PARLIAMENTARY PROCEDURE INFORMATION SHEET**

<table>
<thead>
<tr>
<th>ROBERT'S RULES OF ORDER NEWLY REVISED (12th Edition)</th>
<th>Simplified Table of Rules Relating to Motions</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>May Interrupt</strong></td>
<td><strong>Must Be Seconded</strong></td>
</tr>
<tr>
<td>Fix the Time to Which to Adjourn</td>
<td>No</td>
</tr>
<tr>
<td>Adjourn</td>
<td>No</td>
</tr>
<tr>
<td>Recess</td>
<td>No</td>
</tr>
<tr>
<td>Raise a Question of Privilege</td>
<td>No</td>
</tr>
<tr>
<td>Call for the Orders of the Day</td>
<td>Yes</td>
</tr>
<tr>
<td>Lay on the Table</td>
<td>No</td>
</tr>
<tr>
<td>Previous Question (Stop Debate)</td>
<td>No</td>
</tr>
<tr>
<td>Limit or Extend Limits of Debate</td>
<td>No</td>
</tr>
<tr>
<td>Postpone to a Certain Time</td>
<td>No</td>
</tr>
<tr>
<td>Refer or Commit</td>
<td>No</td>
</tr>
<tr>
<td>Amend</td>
<td>No</td>
</tr>
<tr>
<td>Postpone Indefinitely</td>
<td>No</td>
</tr>
<tr>
<td><strong>MAIN Motion</strong></td>
<td>No</td>
</tr>
<tr>
<td>Objection to Consideration of Question</td>
<td>Yes</td>
</tr>
<tr>
<td>Point of Order</td>
<td>Yes</td>
</tr>
<tr>
<td>Suspend the Rules</td>
<td>No</td>
</tr>
<tr>
<td>Take from the Table</td>
<td>No</td>
</tr>
<tr>
<td>Reconsider (14)</td>
<td>(15)</td>
</tr>
</tbody>
</table>

**Notes:**
- M: Majority
- (1) No, if business pending
- (2) No, ordinary
- (3) No, if business pending
- (4) only negative vote sustaining objection
- (5) only negative vote
- (6) if before action
- (7) No, if pending
- (8) only on unexecuted part
- (9) only on time
- (10) if committee hasn’t started consideration
- (11) if motion is
- (12) maximum of 2
- (13) only affirmative vote
- (14) only on same day or following day
- (15) if no one is speaking
1. Election of President-Elect
   A. Nominating Speech for the person(s) nominated by the Nominating Committee
   B. Second
   C. Speaker calls 3 times for other nominations from the floor (For each candidate nominated from the floor, there will be a Nominating Speech and a Second)

   If more than one candidate: OR: If only one candidate:
   Random drawing of first delegation to be called in roll call.
   ROLL CALL ELECTION
   Majority required to elect
   SPEAKER DECLARES ELECTED BY ACCLAMATION

2. Election of Vice-President
   A. Nominating Speech for the person(s) nominated by the Nominating Committee
   B. Second
   C. Speaker calls 3 times for other nominations from the floor (For each candidate nominated from the floor, there will be a Nominating Speech and a Second)

   If more than one candidate: OR: If only one candidate:
   Random drawing of first delegation to be called in roll call.
   ROLL CALL ELECTION
   Majority required to elect
   SPEAKER DECLARES ELECTED BY ACCLAMATION

3. Election of Secretary-Treasurer
   A. Nominating Speech for the person(s) nominated by the Nominating Committee
   B. Second
   C. Speaker calls 3 times for other nominations from the floor (For each candidate nominated from the floor, there will be a Nominating Speech and a Second)

   If more than one candidate: OR: If only one candidate:
   Random drawing of first delegation to be called in roll call.
   ROLL CALL ELECTION
   Majority required to elect
   SPEAKER DECLARES ELECTED BY ACCLAMATION

4. Election of 2 Trustees, 3-Year Terms Each
   A. Nominating Speech for a person nominated by the Nominating Committee
   B. Second
   C. Nominating Speech for person(s) nominated by the Nominating Committee
D. Second(s)
E. Speaker calls 3 times for other nominations from the floor. (For each candidate nominated from the floor, there will be a Nominating Speech and a Second)

OR:

F1. If more than two candidates:
   Random drawing of first delegation to be called in roll call.
   ROLL CALL ELECTION.
   Regular votes doubled (example: entitled to 16 votes, becomes 32 votes for this specific election). Maximum vote for any candidate will be regular votes (example: 16). Must vote all (example: 32) of the doubled votes allocated among the various candidates.

OR:

F2. If only two candidates:
   SPEAKER DECLARES ELECTED BY ACCLAMATION

Majority of regular vote required to elect.

- CONTINUE ROLL CALLS UNTIL 2 CANDIDATES RECEIVE MAJORITY OF REGULAR VOTE AND ARE ELECTED
- WHEN 1 CANDIDATE RECEIVES A MAJORITY AND IS ELECTED, THE NUMBER OF VOTES RETURNS TO REGULAR AMOUNT
- ROLL CALLS CONTINUE UNTIL A SECOND CANDIDATE RECEIVES A MAJORITY AND IS ELECTED
- CANDIDATES CAN WITHDRAW AT ANY TIME, BUT CANNOT BE FORCED TO WITHDRAW, NOT EVEN IF THEY RECEIVE ZERO VOTES.

5. Election of Trustee for Unexpired Term (Two-year Term and/or One-year Term, in that order)

A. Nominating Speech for person(s) nominated by the Nominating Committee
B. Second
C. Speaker calls 3 times for other nominations from the floor (For each candidate nominated from the floor, there will be a Nominating Speech and a Second)

If more than one candidate:
Random drawing of first delegation to be called in roll call.
ROLL CALL ELECTION
Majority required to elect

OR:

If only one candidate:
SPEAKER DECLARES ELECTED BY ACCLAMATION
AOA Constitution and Bylaws Amendments

Who Can Propose:  1) Any AOA Affiliate  
                           2) AOA Board of Trustees

When Must Constitution and Bylaws Proposal Be Made: Not less than 100 days before the day the AOA Congress commences, the proposal from an AOA Affiliate must be submitted in writing to the AOA Secretary-Treasurer.

How Are AOA House of Delegates Members and Others Notified: Not less than 90 days before the day the AOA Congress commences, a written notice of all proposed Constitution and Bylaws changes is sent out to all affiliate Presidents and Secretaries. House of Delegates members receive copies of the proposals in their Congress materials.

Does Constitution or Bylaws Proposal Require AOA Board of Trustees Approval: No.

Does Constitution or Bylaws Proposal Go to Resolutions Committee of the House of Delegates: No.


Can Constitution or Bylaws Proposal Be Amended by the House of Delegates: Yes, but only if the amendment is germane to the original proposal. For example, a proposal to amend the dues could not be amended to alter the nominating process for officers because the latter topic has nothing to do with the original proposal nor can the amount of the increase be raised to larger than that indicated in the 90-day notice. The 90-day notice requirement cannot be evaded by floor amendments that are not germane or go beyond what was sent out.

Resolutions to the AOA House of Delegates

Who Can Propose:
   1) Any AOA Affiliate  
       2) AOA Board of Trustees  
       3) Any AOA Section  
       4) AOA House of Delegates

When Must Resolution Be Made:
   1) AOA Affiliate must do so at least 15 days prior to the first day of the AOA Congress  
   2) AOA Board of Trustees may do so at any time  
   3) AOA Section must do so at least 15 days prior to the first day of the AOA Congress  
   4) AOA House of Delegates may do so at any time (2/3 vote required)

How Are AOA House of Delegates Members and Others Notified: Resolutions from AOA Affiliates and AOA Sections must be submitted in writing to the AOA Secretary-Treasurer at least 15 days before the first day of the AOA Congress. They are then referred automatically to the Resolutions Committee of the House of Delegates. The Resolutions Committee determines which resolutions are then sent to the floor of the House of Delegates. Copies of resolutions going to the floor of the House of Delegates must be provided to delegates at least 4 hours before they are to be considered by the House.

Does Resolution Require AOA Board of Trustees Approval: No.
**Does Resolution Go to Resolutions Committee of the House of Delegates:** Yes. The Resolutions Committee can approve, modify, or reject the resolution by holding it in the Resolutions Committee. The House of Delegates, by a 2/3 vote, can consider a resolution that the Resolutions Committee has held in committee.

**What Vote Is Required for House of Delegates to Pass:** Majority vote of House of Delegates.

**Can Resolution Be Amended by the House of Delegates:** Yes, but only if the amendment is germane to the original proposal. For example, a resolution to adopt a policy on glaucoma treatment could not be amended to alter the policy on horizontal gaze nystagmus because the latter topic has nothing to do with the original resolution. In other words, you cannot evade the Resolutions Committee process by floor amendments that are not germane.

**Review by the Judicial Council:** Resolutions are subject to review by the Judicial Council before becoming effective. A four-fifths (4/5) vote of the Judicial Council is required to return a resolution to next year’s House for reconsideration.

**Substantive Motions to the House of Delegates**

**Who Can Propose:** Any delegate to the AOA House of Delegates.

**When Must Substantive Motion Be Made:** During the meeting of the AOA House of Delegates, but not after the last call for substantive motions from the Speaker of the House. No substantive motions can be made on the last day of the House of Delegates.

**How Are AOA House of Delegates Members and Others Notified:** Although there is no advance notice requirement, prior notice to the Speaker is helpful to facilitate discussion and debate. Substantive motions occur on the floor of the House of Delegates.

**Does Substantive Motion Require AOA Board of Trustees Approval:** No.

**Does Substantive Motion Go to Resolutions Committee of the House of Delegates:** No.

**What Vote Is Required for House of Delegates to Pass:** Majority vote of House of Delegates.

**Can Substantive Motion Be Amended by the House of Delegates:** Yes, but only if the amendment is germane to the original motion. For example, a substantive motion to fund a program could not be amended to create a committee to study an entirely unrelated topic because the latter topic has nothing to do with the original motion. In other words, you cannot evade normal parliamentary procedure by floor amendments that are not germane. You could, of course, just make a separate, new substantive motion. Substantive motions can be made on any subject that does not require a Constitution or Bylaws amendment but are usually not made for major policy determinations because they do evade the Resolutions Committee deliberative process. For that reason, substantive motions that are major policy issues are often referred to a Resolutions Committee for study, often at the recommendation of the Speaker of the House.

**Review by the Judicial Council:** Substantive Motions are subject to review by the Judicial Council before becoming effective. A four-fifths (4/5) vote of the Judicial Council is required to return a substantive motion to next year’s House for reconsideration.
AOA Meeting Procedures - Quick Reference Guide

This document describes the most common types of motions at meetings and includes guidance on how such motions are handled. It also addresses some other issues that may come up during the meeting. The meeting chair (“Chair”) is responsible for making sure (1) that the meeting participants address the items on the agenda (keeping the meeting “on track”), (2) that meeting participants’ rights to propose motions, debate motions, and vote are respected, and (3) that the rules governing the meeting (AOA Constitution and Bylaws and Robert’s Rules of Parliamentary Procedure – 12th Edition) are followed. Throughout this reference guide, the word “Assembly” refers to the participants in the meeting who have a right vote on matters coming before the group – for example, the members of an AOA committee.

Main Motions and Subsidiary Motions

A **Main Motion** is any motion that brings business before the Assembly. Resolutions, “Substantive Motions”, and bylaws amendments all fall in this category.

**Subsidiary Motions** are those that are applied to the main motion for the purpose of changing or disposing of it. The most common subsidiary motion is the motion to “Amend” the main motion.

Introducing and Debating Motions

The way to introduce a main motion is for a meeting participant to stand and say, “I move that…”. Most motions require a second (if unsure, it’s never improper to simply have a second). Another participant may rise to say “I second the motion,” or the Chair may have to ask, “Is there a second for this motion.”

At that point, the Chair would say, “It is moved and seconded that (state the question),” and then say, “is there any discussion,” or “would anyone like to speak?” The Chair customarily allows the original mover to speak first. If it’s not clear who stood up to speak first, do your best to establish priority and say, “The chair recognizes (name)” to make clear who has the right to speak first.

After people have had a chance to speak, the Chair asks, “is there any further discussion? There being no further discussion, all those in favor of the motion please say ‘aye,’ all those opposed, say ‘no’. The ayes/nos have it, and the motion is adopted/lost.”

If during the debate, a **subsidiary motion** is introduced (such as a motion to amend), then that motion is addressed separately using the the same rules as described above (the subsidiary motion in essence temporarily becomes the main motion). That motion must be disposed of before going back to the main motion.

Rules of Debate

*Notes: everyone is entitled to speak twice on each motion; preference should be given to people who have not spoken yet when someone is seeking to speak a second time.*

The right to **debate** questions is an important right. Debate can only be cut off by the Assembly itself by introduction of a subsidiary motion such as the motion to “Call the Previous Question,” or a motion to “Limit Debate.” Both motions require 2/3 approval for adoption. A speaker cannot be **interrupted** except in in very limited circumstances. However, Robert’s Rules limits comments by any one person to 10 minutes at a time. This means there is no such thing as a “filibuster” under Robert’s Rules. If the Chair wishes to enforce the 10 minute rule, it is customary to give the speaker a warning and a brief period (less than a minute) to wrap up their statement.
It is possible for a member of the Assembly to **end all debate** on a question by introducing a motion to Call the Question, Limit Debate, Postpone Indefinitely consideration of the question, or Lay the Motion on the Table (which is used when you plan to take up the question again later in the meeting).

It is also possible for the Assembly to **object to the consideration** of a motion by a 2/3 vote **before debate begins**, but this is only used when the Assembly strongly feels that the question is totally improper and should not even be debated. In most cases, it is enough to either defeat a motion or postpone its consideration indefinitely as a way to kill it.

**Privileged Motions** and **Incidental Motions** are an exception to the general rule that a questions must be dealt with and disposed of while it’s on the floor before moving on. These motions temporarily interrupt debate about the motion being considered. The major difference between the two is that a privileged motion is not related to the pending questions, while an incidental motion is related. If a motion to recess or adjourn is adopted, debate is suspended until the Assembly reconvenes after the recess/adjournment, at which time the business is take up at the same point where it left off.

**Revisiting a Question**

This area gets confusing, so if it should come up, it’s probably best for the Chair to take a short sidebar to discuss how to proceed. It is possible to move to “Reconsider” something done **earlier that same day**. Only someone who voted **in favor of** the earlier motion may move to reconsider it. The assembly cannot “Reconsider” subsidiary motions once the main motion to which they applied has been adopted.

It is also possible to move to “Rescind” or “Amend” something previously adopted. This requires a 2/3 vote, and in some cases is out order, depending on the content of the motion being rescinded.

**List of Common Motions**

*Subsidiary Motions:*

“Amend”

“Lay on the Table” (save for consideration later in the meeting)

“Call the Previous Question” (forces vote on the original main motion)

“Refer to Committee a.k.a. ‘Commit’”

“Postpone Indefinitely” (kills the motion)

*Privileged and Incidental:*

“Adjourn” (ends the meeting, or one day of a meeting if a multi-day meeting)

“Recess” (short break)

“Point of Order” (questions whether rules of assembly are being violated)

“Suspend the Rules” (temporarily change Robert’s Rules) – can’t be applied to anything that requires advance notice (for example, bylaws amendments). If applied to something that requires 2/3 majority vote, then needs 2/3 approval to pass). Can use ‘unanimous consent’ approach if non-controversial (RR p. 266)

“Call for Orders of the Day” (question whether assembly has skipped over some item of business).

*Miscellaneous:*
“Take from the Table” (force the Assembly to take up a matter tabled earlier in the meeting)

For more detailed treatment of rules applied to the most common motions, refer to Roberts Rules 11th Edition, or the chart contained in the AOA House of Delegates Procedures document.
SUMMARY OF ACTIONS
SUMMARY OF ACTIONS
BOARD OF TRUSTEES
AMERICAN OPTOMETRIC ASSOCIATION
MARCH 2 – 3, 2023
ATLANTA, GA

- The Board appointed Angela Weger, CPOT, CPOC as member of the CPC, with
  Kellie Thomas, CPOT, as an alternate appointment if Ms. Weger is unable to
  serve.
- Appointed Janet Millis, CPOT, as CPC chair for an additional term.
- Approved publication of updated ACOE Policy and Procedure manual and
  Standard 4.3 of the Standards for professional optometric degree programs
  seeking preliminary approval pre-accreditation status,” and confirmed that
  content is within the authority of the ACOE as set forth in the AOA Bylaws and
  ACOE’s scope and function.

SUMMARY OF ACTIONS
BOARD OF TRUSTEES
AMERICAN OPTOMETRIC ASSOCIATION
APRIL 13 – 15, 2023
CHICAGO, IL

- The Board approved minutes from the January 19 – 21, 2023 Board meeting.
- Approved minutes from the March 2 – 3, 2023 Board meeting.
- Approved updates to the definition of “optometric vision therapy”.
- Approved the minutes from the 125th Annual Congress in June 2022, in Chicago,
  IL.
- Approved changes to the AOA Group Member Life and Long-term Disability
  Policies.
- Approved an extension of the AGIA third-party administrator agreement for the
  AOA Group Member Life and Long-term Disability policies.
- Approved a premium credit for participants in the AOA Group Member Life and
  Long-term disability policies.
- Approved recommendation of Boston as 2027 Optometry’s Meeting to the House
  of Delegates.

SUMMARY OF ACTIONS
BOARD OF TRUSTEES
AMERICAN OPTOMETRIC ASSOCIATION
APRIL 23, 2023
VIRTUAL

- No official action taken.
• The Board approved changes to the Financial Policies and Procedures Manual.

SUMMARY OF ACTIONS
BOARD OF TRUSTEES
AMERICAN OPTOMETRIC ASSOCIATION
JUNE 24, 2023
WASHINGTON, D.C.

• The Board approved the minutes from the April 13-15 Board meeting.
• The Board made the following appointments to the ACOE:
  1. Reappoint Jacqueline Davis, O.D. to second three-year term;
  2. Reappoint William Miller, O.D., Ph.D. to second three-year term;
  3. Reappoint Regan Michelle Welch, O.D. to second three-year term.

SUMMARY OF ACTIONS
BOARD OF TRUSTEES
AMERICAN OPTOMETRIC ASSOCIATION
AUGUST 3 – 5, 2023
WHITEFISH, MT

• The Board approved publication of updated ACOE Policy and Procedure manual and confirmed that content is within the authority of the ACOE as set forth in the AOA Bylaws and ACOE’s scope and function.
• Approved minutes from the April 23, 2023 virtual Board meeting, June 19 – 20, 2023 Board meeting, and June 24, 2023 Board meeting.

BOARD OF TRUSTEES
AMERICAN OPTOMETRIC ASSOCIATION
SEPTEMBER 21, 2023
UNANIMOUS WRITTEN CONSENT

• The Board approved a change to the investment options available in the AOA Employee 401(k) Plan.
SUMMARY OF ACTIONS
BOARD OF TRUSTEES
AMERICAN OPTOMETRIC ASSOCIATION
OCTOBER 4 – 7, 2023
KEY WEST, FL

• The Board approved minutes from the August 3 – 5, 2023 Board meeting.
• Approved Resolution renewing AOA Letter of Credit with UMB Bank.
• Approved changes to AOA Strategic Plan.
• Approved changes to AOA Financial Policies and Procedures Manual.
• Approved grant of Investigator-initiated Research Award to Dr. Marsack at University of Houston.
• Approved updates to Board Operational Directives
• Approved 2023 Budget.
• Approved increase to President’s Board meeting stipend.

SUMMARY OF ACTIONS
BOARD OF TRUSTEES
AMERICAN OPTOMETRIC ASSOCIATION
OCTOBER 25, 2023
VIRTUAL

• No official action taken.

SUMMARY OF ACTIONS
BOARD OF TRUSTEES
AMERICAN OPTOMETRIC ASSOCIATION
NOVEMBER 6, 2023
VIRTUAL

• No official action taken.

BOARD OF TRUSTEES
AMERICAN OPTOMETRIC ASSOCIATION
NOVEMBER 29, 2023
UNANIMOUS WRITTEN CONSENT

• The Board approved a change to the investment options available in the AOA Employee 401(k) Plan.
SUMMARY OF ACTIONS
BOARD OF TRUSTEES
AMERICAN OPTOMETRIC ASSOCIATION
FEBRUARY 1, 2024
ST. LOUIS, MO

• No official action taken.

SUMMARY OF ACTIONS
BOARD OF TRUSTEES
AMERICAN OPTOMETRIC ASSOCIATION
FEBRUARY 29 – MARCH 1, 2024
ATLANTA, GA

• The Board selected the AOA-PAC Board slate:
  1. Jeni Kohn, O.D - Chair
  2. Joe Ellis, O.D. - Director
  3. Andrea Thau, O.D. - Director
  4. Cyndie Baker, O.D. - Director
  5. Angelique Sawyer, O.D. - Director
  6. Jason Tu, O.D. - Director
  7. Matt Maki, O.D. - Director
  8. Sean Claflin, O.D. - Director
  9. Gabby Marshall, O.D. - Director
 10. Matt Jones, O.D. (Arkansas) - Director
 11. Matt Jones, O. D. (Illinois) – Director

• Approved publication of the Evidence Based Glaucoma Guidelines for comment.
ELECTIONS AND BYLAWS
ARTICLE I — NAME

ARTICLE II — OBJECTS

ARTICLE III — ORGANIZATION
Section 1. Affiliated Associations
Section 2. Membership
Section 3. Sections

ARTICLE IV — GOVERNMENT
Section 1. House of Delegates
Section 2. Board of Trustees
Section 3. Officers

ARTICLE V — CONGRESS

ARTICLE VI — AMENDMENTS

CONSTITUTION

BYLAWS

ARTICLE I — MEMBERSHIP
Section 1. Classification and Qualifications
A. Affiliate Membership Qualifications
B. Membership Rights
C. Affiliate Membership Classifications
1. Active Members
2. Partial Practice Members
3. Federal Service Members
4. Optometric Educator Members
5. Distinguished Members
6. Student Members
7. Post-Graduate Members
8. Retired Members
9. Life Members
10. Honorary Members
D. Associate Membership Classifications and Qualifications
1. International Members
2. Paraoptometric Members
3. Public Members
E. Provisional Membership Classification and Qualifications

Section 2. Dues
A. Adjustments in Dues
B. Payment of Dues
C. Affiliate Member Dues
1. Active Members
2. Partial Practice Members
3. Federal Service Members
4. Optometric Educator Members
5. Distinguished Members
6. Student Members
7. Post-Graduate Members
8. Retired Members
9. Life Members
10. Honorary Members
D. Associate Member Dues
1. International Members
2. Paraoptometric Members
3. Public Members
E. Provisional Member Dues
F. Ascending Dues
G. Waived or Reduced Rates
H. Proration and Miscellaneous Requirements

Section 3. Termination of or Changes in Membership
A. Expulsion of Members by Affiliates
B. Expulsion of Members for Cause
C. Changes in Membership Classification

ARTICLE II — HOUSE OF DELEGATES
Section 1. Composition
Section 2. Congresses
A. Annual
B. Special
Section 3. Delegates
A. Representing Affiliated Associations
B. Representing Student Members
C. Representing Sections
D. Special Congresses
Section 4. Credentials Committee
Section 5. Voting and Debates
A. Voting
B. Debates
C. Alternate Delegates
D. Special Congresses
A. Annual
B. Special

ARTICLE III — BOARD OF TRUSTEES
Section 1. Election, Term of Office and Vacancies
A. Composition
B. Terms of Trustees
C. Vacancy, How Filled
D. Duties

CONSTITUTION AND BYLAWS
Effective June 18, 2022

OUTLINE

(Note: This Outline is for informational purposes only and is not a part of the Constitution and Bylaws.)
ARTICLE IV — OFFICERS
Section 1. Election, Term of Office and Vacancies
A. Listing
B. Manner of Selection
C. Term of Office
D. Vacancy, How Filled
Section 2. Duties
A. President
B. Immediate Past President, President-Elect, Vice President
C. Secretary-Treasurer

ARTICLE V — COUNCILS
Section 1. Accreditation Council on Optometric Education
A. Composition
B. Appointment of ARBO and Educator Members
C. Term of Office
D. Vacancy, How Filled
E. Duties
Section 2. Judicial Council
A. Composition
B. Vacancy, How Filled
C. Review of Resolutions
D. Referral of Resolutions
E. House of Delegates Reconsideration
F. Advisory Opinions
G. Five Year Review of Resolutions and Substantive Motions
Section 3. Council on Research
A. Composition
B. Appointment of Members
C. Vacancy, How Filled
D. Duties

ARTICLE VI — SECTIONS

ARTICLE VII — EXECUTIVE DIRECTOR

ARTICLE VIII — MISCELLANEOUS

ADMINISTRATIVE PROVISIONS
Section 1. Reimbursement for Expenses
Section 2. Procedures for Contracts
Section 3. Removal of Officer or Trustee
Section 4. Indemnification of Officers and Trustees
Section 5. Method of Notice

ARTICLE IX — AMENDMENTS
CONSTITUTION OF THE
AMERICAN OPTOMETRIC ASSOCIATION

ARTICLE I
NAME

The name of this organization, established as a not for profit corporation under the laws of the State of Ohio, is the American Optometric Association.

ARTICLE II
OBJECTS

The objects of the Association are to improve the vision care and health of the public and to promote the art and science of the profession of optometry.

ARTICLE III
ORGANIZATION

Section 1. Affiliated Associations

Affiliated associations shall be those optometric associations of states, the District of Columbia, commonwealths, territories or possessions of the United States, and such other optometric organizations as may be designated by the House of Delegates as an affiliated association, which are, or may hereafter be, recognized by this Association as constituents of and affiliated with the American Optometric Association. Application to the House of Delegates for designation as an affiliate of this Association shall be filed in the form of a resolution with the secretary-treasurer, in compliance with all requirements of Section 6 of Article II of the bylaws, and shall require a majority vote of the House of Delegates for approval.

Section 2. Membership

The membership of this Association shall consist of optometrists and other persons whose classifications, qualifications, privileges and obligations shall be as established in the bylaws of this Association.

Section 3. Sections

Members can unite in the formation of a special section upon petition to the House of Delegates in compliance with Article VI of the bylaws of this Association. The governing of each section shall be determined according to rules and regulations established in the bylaws of this Association.

ARTICLE IV
GOVERNMENT

Section 1. House of Delegates

The legislative and policy-making body of this Association shall be the House of Delegates, which shall be established and function as provided in the bylaws.

Section 2. Board of Trustees

The administrative body of this Association shall be the Board of Trustees, which shall implement the policies established by the House of Delegates and perform such duties as are prescribed in the bylaws.

Section 3. Officers

The officers of this Association shall be a president, president-elect, vice-president, secretary-treasurer, and an immediate past-president. Their qualifications, duties and terms of office shall be as provided in the bylaws.

ARTICLE V
CONGRESS

A meeting of the House of Delegates shall be called a “congress”. The House of Delegates shall meet at an annual congress and may meet at such other times as provided in the bylaws.

ARTICLE VI
AMENDMENTS

This constitution may be amended by the House of Delegates by two-thirds (2/3) of the votes cast at any congress, provided that the proposed amendment had previously been recommended by a convention or the governing board of an affiliated association, or by the Board of Trustees of this Association, and that one (1) copy of the proposed amendment had been received by the secretary-treasurer of this Association not less than one hundred (100) days before the commencement of the congress which is to consider and act on the proposed amendment. Not less than ninety (90) days before said congress, the secretary-treasurer of this Association shall deliver to the president, secretary, and official office of each affiliated association a copy of the proposed amendment with a notice stating that the proposed amendment will be submitted for consideration at the said congress. At the discretion of the secretary-treasurer of this Association, delivery of the proposed amendments under this Article may be made by any written means, whether physical, electronic, digital, or otherwise provided that such means provides the secretary-treasurer with documentation of verifiable receipt of such notice, which shall be maintained with the Association’s records. Unless specifically stated to the contrary, all amendments to the constitution adopted by the House of Delegates shall become effective on January 1 of the calendar year which immediately follows the House of Delegates which approved such amendment.
ARTICLE I
MEMBERSHIP

Section 1. Classification and Qualifications

No person who is a member of the American Optometric Association as of June 25, 2005, or who joins an affiliate of the American Optometric Association on or after June 25, 2005, shall be allowed to be a member of the affiliate but not the American Optometric Association. Members of the American Optometric Association shall be classified as follows:

A. Affiliate Membership Qualifications. No person who is a member of the American Optometric Association (the "Association") as of June 25, 2005, or who joins an affiliate of the Association on or after June 25, 2005, shall be allowed to be a member of the affiliate but not the Association. Additionally, except as expressly provided otherwise in these Bylaws, all Affiliate Members of the Association must:

1. Be an "optometrist," which shall mean an individual who has earned a Doctor of Optometry degree from a school or college that has been accredited or pre-accredited by the Accreditation Council on Optometric Education or by an accrediting body that the Board of Trustees, in its sole discretion, determines to be equivalent;

2. Be a member in good standing of one of the following:
   (a) the affiliated association where the member resides;
   (b) the affiliated association where the member has his or her principal place of optometric-related employment;
   (c) the affiliated association of the state where the school or college of optometry is located, provided that the Affiliate Member qualifies as an Optometric Educator Member at that school or college;
   (d) the Armed Forces Optometric Society ("AFOS"), provided that the Affiliate Member is (i) on active duty or retired from service in the armed services of the United States, the Commissioned Corps of the United States Public Health Service; or (ii) a full-time, part-time, or retired employee of the U.S. Department of Veterans Affairs or other federal governmental entity;
   (e) the American Optometric Student Association provided that the Affiliate Member qualifies as a Student Member, or
   (f) the American Optometric Student Association or any affiliated association provided that the Affiliate Member qualifies as a Post-Graduate Member; and

3. Pay all dues required for the Affiliate Member pursuant to these bylaws so that such dues are timely received by this Association.

B. Membership Rights. All members shall have full membership rights as set forth in these Bylaws, except that Retired Members electing not to pay dues, Honorary Members, Associate Members, and Provisional Members shall not be eligible to be elected or appointed as officers, trustees, or delegates of this Association.

C. Affiliate Membership Classifications. Members of the American Optometric Association shall be classified as follows:

1. Active Members. An optometrist meeting the qualifications set forth in Article I, Section 1, Paragraph A shall be eligible for classification as an Active Member of this Association.

2. Partial Practice Members. An optometrist meeting the qualifications set forth in Article I, Section 1, Paragraph A who works sixteen hours or less per week in compensated, optometrically related activities shall be eligible for classification as a Partial Practice Member of this Association. A Partial Practice Member may affiliate through AFOS provided that the member meets the requirements under Article I, Section 1, Paragraph A.2(d).

3. Federal Services Members. An optometrist meeting the qualifications set forth in Article I, Section 1, Paragraph A.2(d) shall be eligible for classification as a Federal Services Member of this Association.

4. Optometric Educator Members. An optometrist meeting the qualifications set forth in Article I, Section 1, Paragraph A who is a full-time educator primarily engaged in school related activities such as teaching, research and administration at a school or college in the United States, accredited or pre-accredited by the Accreditation Council on Optometric Education, and who is directly compensated by such school or college shall be eligible for classification as an Optometric Educator Member of this Association.

Such optometric educator members are permitted to engage in the practice of optometry for no more than 16 (sixteen) hours per week.

5. Distinguished Members. An optometrist meeting the qualifications set forth in Article I, Section 1, Paragraph A shall automatically be classified as a Distinguished Member on January 1 the year following completion of a term of office of president of this Association.

6. Student Members. A student of optometry in a program at a school or college accredited or pre-accredited by the Accreditation Council on Optometric Education who is (a) a member in good standing of the affiliated association for such students and (b) of another affiliated association (provided; however, the requirement in (b) shall not apply to students attending a program outside of the fifty United States and the District of Columbia) shall be eligible for classification as a Student Member of this Association. Student Members shall meet all the qualifications set forth in Article I, Section 1.A, except that a Student Member is not required to be an "optometrist" as defined in Article I, Section 1, Paragraph A.1. Membership classification as a Student Member shall immediately cease and convert to the appropriate Affiliate Membership Classification (Active Member, Federal Services Member, Optometric Educator Member or Post-Graduate Member) when an individual receives the degree of Doctor of Optometry. This automatic change in member classification shall not be counted for purposes of applying Article I, Section 3, Paragraph C, which limits changes in member classification to one per year.

7. Post-Graduate Members. An optometrist meeting the qualifications set forth in Article I, Section 1, Paragraph A who is a resident or intern in a program accredited or pre-accredited by the Accreditation Council on Optometric Education or by an accrediting body that the Board of Trustees, in its sole discretion, determines to be equivalent and/or full-time enrollee in a graduate program shall be eligible for classification as a Post-Graduate Member of this Association. Membership classification as a Post-Graduate Member may continue until the end of the calendar year in which an eligible Post-Graduate Member has completed the qualifying program.

8. Retired Members. An optometrist meeting the qualifications set forth in Article I, Section 1, Paragraph A who is at least 55 years old on January 1 of any membership year and who no longer receives compensation for optometrically related activities shall be eligible for classification as a Retired Member of this Association. Membership classification as a Retired Member may continue until the end of the membership year provided that the optometrist is a member in good standing of the Association at the time he or she first becomes eligible for classification as a Retired Member. A Retired Member may affiliate through AFOS provided that the member meets the requirements under Article I, Section 1, Paragraph A.2(d).
Individuals eligible for classification as a Retired Member have the option to pay dues as set forth in Article I, Section 2, Paragraph C.8. Retired Members electing to pay dues (known as Retired Members with Membership Benefits) will receive membership benefits and will be entitled to membership rights as set forth in these Bylaws. Notwithstanding any provision to the contrary, Retired Members electing not to pay annual dues (known as Retired Members without Membership Benefits) will be members of this Association in name only, ineligible for membership benefits and rights, and will not be counted among the members used to determine delegates for affiliated associations under Article III, Section 3, Paragraph A.

9. Life Members. An optometrist meeting the qualifications set forth in Article I, Section 1, Paragraph A who has been a member of this Association for 45 years shall be eligible to continue membership as a Life Member of this Association in accordance with rules and regulations adopted by the Board of Trustees. In addition, when an affiliate designates an affiliate member as a life member of the affiliate, and the member is also a member of this Association, then this Association may also designate that member as a Life Member of this Association. Classification as a Life Member shall become effective upon approval by the Secretary-Treasurer or his or her designee. A Life Member may affiliate through AFOS provided that the member meets the requirements under Article I, Section 1, Paragraph A.2(d). Notwithstanding the requirements set forth in this Paragraph, any member of this Association who is classified as a Life Member as of September 30, 2012, shall retain Life Member status.

Members who provide medical certification of terminal or other serious debilitative illness may request that years of membership be waived for life membership. All such requests for waiver must be made and approved through the member’s affiliate and approved by the Board of Trustees or the Secretary-Treasurer as the Board’s designee.

10. Honorary Members. An individual who has rendered outstanding service to the profession of optometry may be eligible for membership in this Association as an Honorary Member. Honorary Members shall be excused from the requirements that they be an “optometrist” as defined by Article I, Section 1, Paragraph A.1. Written nomination for membership as an Honorary Member shall be made by an affiliated association to the Board of Trustees, which shall submit the nomination to the House of Delegates with a recommendation for approval or disapproval. Membership under this subparagraph shall become effective upon approval by the House of Delegates.

D. Associate Membership Classifications and Qualifications. Individuals meeting the qualifications of this Paragraph may apply directly to this Association for membership as an Associate Member. Such membership shall become effective upon approval by the Board of Trustees, the Secretary-Treasurer or his or her designee, and may continue as long as the individual continues to satisfy the qualifications of subparagraphs 1, 2 and 3 of this section below. Membership is dependent upon the Associate Member paying all dues required for the Associate Member pursuant to these bylaws so that such dues are timely received by this Association. The following individuals shall be eligible for membership in this Association in one of the following classifications of Associate Members:

1. International Members. An optometrist as defined by the World Council of Optometry who resides in a foreign country or in a commonwealth, territory or possession of the United States where there is no affiliated association shall be eligible for membership as an International Member of this Association.

2. Paraoptometric Members. A paraoptometric who is and continues to be sponsored by an optometrist who is a member of this Association shall be a Paraoptometric Member of this Association.

3. Public Members. An individual who is not an optometrist but has a substantial interest in the profession of optometry and contributes to the advancement of the interests of this Association – as determined in the sole judgement of the President and Secretary-Treasurer – may be eligible for membership as a Public Member of this Association. The affiliated association in the state of the applicant’s principal place of business or residence shall be given 30 days notice to object to any application prior to the granting of Public Member status by this Association.

4. Research Scientist Members. An individual who is not an optometrist but who holds a PhD degree or is a PhD student and is employed by a school or college of optometry that is accredited or pre-accredited by the Accreditation Council on Optometric Education shall be eligible for membership as a Research Scientist Member.

E. Provisional Membership Classification and Qualifications. An individual meeting the requirements of Article I, Section 1A, Paragraph 1 and this paragraph, who contacts the American Optometric Association seeking membership, and who completes an application and pays the applicable dues, may be immediately granted membership in the Provisional membership classification. The Provisional Member’s application shall be submitted to the appropriate affiliated association for action by that affiliate. The affiliated association shall promptly notify AOA when they have taken action on any Provisional Member’s application. If the application is approved by the affiliate, the Provisional Member shall cease to be classified as a Provisional Member and will immediately become an Affiliate Member in the appropriate classification. If the application is not approved by the affiliated association, the Provisional membership will immediately expire. If AOA does not receive notice of an affiliated association’s action within one hundred-twenty (120) days from submission of the Provisional Member’s application to the affiliate, the Provisional Member will immediately become an Affiliate Member.

Section 2. Dues

A. The Board of Trustees may increase the annual dues in any one year in an amount not to exceed five percent (5%) of the previous year’s annual dues, and the Board of Trustees shall report to the House of Delegates the amount of the increase. A special dues assessment of $85 per year shall additionally be imposed each year commencing in 2009, with such special dues assessment funds dedicated to funding the costs and expenses of the Association related to running a public relations and public affairs campaign, and such assessment shall terminate the year next succeeding the year the public relations and public affairs campaign terminates.

B. Payment of Dues. Dues are assessed on an annual basis but may be remitted on a quarterly basis. Dues paid quarterly shall be attributed equally and proportionally among the four quarters beginning with the first quarter of the year, which ends March 31, and progressing chronologically to the last quarter of the year, which ends December 31.

Each quarter shall contain three (3) deadlines, a Due Date, a Delinquent Date, and a Termination Date. Quarterly dues shall be paid according to the following schedule of deadlines:

1. First Quarter Dues:
   (a) the Due Date shall be March 31;
   (b) the Delinquent Date shall be April 30; and
   (c) the Termination Date shall be May 31.

2. Second Quarter Dues:
   (a) the Due Date shall be June 30;
   (b) the Delinquent Date shall be July 31; and
   (c) the Termination Date shall be August 31.

3. Third Quarter Dues:
(a) the Due Date shall be September 30;
(b) the Delinquent Date shall be October 31; and
(c) the Termination Date shall be November 30.
4. Fourth Quarter Dues:
(a) the Due Date shall be December 31;
(b) the Delinquent Date shall be January 31; and
(c) the Termination Date shall be the last day of February.

Any preceding quarterly dues deadline that falls on a weekend or federal holiday shall be extended to the following Business Day. For purposes of these Bylaws, "Business Day" shall mean any Monday, Tuesday, Wednesday, Thursday, or Friday that is not a federal holiday.

Membership shall be terminated at the discretion of the AOA Secretary-Treasurer for any member whose dues for a quarter have not been received in full by this Association by that quarter's Termination Date following notification to the affiliate's official office within ten business days.

C. Affiliate Member Dues. Annual dues for Affiliate Members classifications shall be as follows:

1. Active Members shall pay 100% of annual dues.
2. Partial Practice Members shall pay 60% of annual dues.
3. Federal Service Members shall pay 100% of annual dues.
4. Optometric Educator Members shall pay 50% of annual dues.
5. Distinguished Members shall not be required to pay annual dues to this Association.
6. Student Members shall pay $0.00 as annual dues for this Association.
7. Post-Graduate Members shall pay $35.00 as annual dues for this Association.
8. Retired Members must pay annual dues of $100.00 to be eligible for membership benefits and rights as set forth in these Bylaws and to be counted among the members used to determine delegates for affiliated associations under Article III, Section 3, Paragraph A.
9. Life Members shall not be required to pay annual dues to this Association.
10. Honorary Members shall not be required to pay annual dues to this Association.

D. Associate Member Dues. Annual dues for Associate Member classifications shall be as follows:

1. International Members shall pay dues as determined by the Board of Trustees based upon data from the World Bank regarding the country where the member resides.
2. Paraoptometric Members shall pay $0.00 as annual dues for this Association.
3. Public Members shall pay dues as determined by the Board of Trustees.
4. Research Scientist Members shall pay dues as determined by the Board of Trustees.

E. Provisional Member Dues. Annual dues for the Provisional Member classification shall be as follows:

1. Each affiliated association will provide AOA with a list of its membership categories mapped to the Affiliate Membership Classification as defined in Article I, Section C and that affiliated association's annual dues for each category not later than December 1, 2015 and thereafter on an ongoing basis at least thirty (30) days prior to the effective date of any dues change.
2. Provisional Members shall pay 100% of the combined annual dues of the affiliated association and AOA, with proration, for the affiliated association membership classification as determined by AOA's reasonable interpretation of the information supplied on the applicant's application.
3. Dues collected by AOA from any Provisional Member shall be promptly remitted to the affiliated association.
4. Dues collected from a Provisional Member shall be refunded to that individual if his or her Affiliate membership application is denied.

F. Ascending Dues. An active member or federal services member shall not be required to pay any dues during the calendar year in which the individual earns a Doctor of Optometry degree as defined in Article I, Section 1, Paragraph A.1 of these Bylaws. The dues for each of the first, second, third, and fourth calendar year thereafter shall be equivalent to ten percent (10%), twenty percent (20%), fifty percent (50%), and seventy-five percent (75%), respectively, of the annual dues otherwise applicable. A member shall only be eligible for the above schedule of reduced dues once, no matter how many times the individual may transfer from one membership classification to another membership classification or from one affiliated association to another. A member who works sixteen hours or less per week shall not be eligible under this section, but shall pay dues according to the schedule contained in Paragraph C.2 of this section. For Post-Graduate Members, the ascending dues schedule shall begin the calendar year following the year the individual completes the post-graduate program, as set forth in Article I, Section 1, Paragraph C.7.

G. Waived or Reduced Rates. In a case where an affiliated association has waived or reduced its dues requirement for a member because of the member's economic misfortune or partial or total disability, or as part of a special pilot program endorsed by the Board of Trustees, and requests in writing that such member's dues to this Association be waived or reduced in similar proportion, the Board of Trustees or the Secretary-Treasurer as the Board's designee may waive or reduce in like proportion such member's dues obligation to this Association, and for a similar period of time. In a case where a member holds direct membership in this Association without membership in an affiliated association, the Board of Trustees or the Secretary-Treasurer as the Board's designee may waive or reduce in like proportion such member's dues obligation to this Association because of such member's economic misfortune or partial or total disability. In an emergency circumstance such as a natural disaster, war, or terrorist attack, or other similar disastrous occurrence, this Association may independently waive any affected member's dues for up to one year only after consultation with the member's affiliated association.

H. Proration and Miscellaneous Requirements. All dues categories are subject to proration. Proration shall only be done on a monthly basis based on the date the member joined the Association. No other proration method shall be allowed. Proration shall not be permitted when a member terminates membership and is reinstated to membership in the same calendar year, except that proration shall be permitted if such change is due to a change in membership from one affiliate to another.

Section 3. Termination of or Changes in Membership

A. Any member of this Association who is suspended or expelled from membership in an affiliated association shall, upon receipt by the secretary-treasurer of this Association of notice of such suspension or expulsion duly certified by the secretary of the affiliated association, automatically be terminated until such time as such member may be readmitted to membership in an affiliated association.

B. The Board of Trustees may, in appropriate cases, suspend or expel any member because of the revocation or suspension of the member's license to practice optometry, the violation of any federal, state, local or other applicable law, rule or regulation relating to the practice of optometry, or the violation of the code of ethics of this Association, as
the case may be. In such cases, the Board shall send to such member, by registered mail, a statement of the charges against him, and such member shall have fifteen (15) days after receipt thereof to respond to such charges by mailing a copy of this response, by registered mail, to the secretary-treasurer of this Association. The Board, or a subcommittee of the Board, may thereafter hold a hearing at which such member shall be given reasonable opportunity to present evidence and to be heard in the member’s own defense, and the Board may request other persons to testify at the hearing. Such member may be suspended or expelled by a vote of two-thirds (2/3) of the full membership of the Board of Trustees.

C. Changes in Membership Classification. Members will be allowed to change classification only once per year. Applications for a change in membership classification submitted between January 1 and April 30 will be retroactive to the beginning of that calendar year. Applications submitted between May 1 and December 31 will be effective January 1 of the following year. No changes in classification will be accepted for prior periods or prior years.

ARTICLE II
HOUSE OF DELEGATES

Section 1. Composition

The House of Delegates shall be composed of delegates representing members of affiliated associations, certain student members, and members of sections. In addition, each distinguished member and each member of the Board of Trustees shall be entitled to be a delegate, ex officio. A distinguished member or a member of the Board of Trustees may also be selected as a delegate or an alternate representing members of affiliated associations, or certain student members. Delegates and alternate delegates shall be members of this Association who have paid the proper amount of dues owed for the Last Quarter (as defined in Article II, Section 11) and all previous financial quarters to which the waiver applied. However, an affiliated association having less than fifty (50) members under the foregoing calculation shall nonetheless be entitled to one (1) regular delegate.

2. The delegate strength of an affiliated association for the annual congress shall be determined from the records of this Association as of the last Business Day of the Last Quarter (as defined in Article II, Section 11).

3. Each affiliated association may also select one (1) alternate delegate for each delegate to which it is entitled under this section.

4. The president and secretary of each affiliated association, at least fifteen (15) days prior to the first day of the annual congress, shall certify to the secretary-treasurer of this Association the names of the delegates and alternate delegates who shall represent the affiliated association at the congress. The certification shall also state that all attributable quarterly dues of this Association collected by the affiliated association have been remitted to this Association by the Credentialing Deadline (as defined in Article II, Section 11).

B. Delegates Representing Student Members.

1. Student members at each school or college of optometry in the United States, accredited or pre-accredited by the Accreditation Council on Optometric Education as of May 31 of each year, shall be entitled to select one (1) delegate, and the affiliated association representing student members shall be entitled to three (3) delegates selected by such affiliated association.

2. Such student members and the affiliated association representing student members shall be entitled to select one (1) alternate delegate for each delegate to which they are entitled under this section.

C. Delegates Representing Sections.

Each section is permitted one (1) delegate. Each section shall elect from its membership one (1) delegate and one (1) alternate delegate.

D. Delegates at Special Congresses.

Each affiliated association, student members, and sections shall be entitled to the same number of delegates and alternate delegates at a special congress as at the immediately preceding congress. Delegates and alternate delegates at a special congress shall be selected from among those members eligible to serve as delegates or alternate delegates at the immediately preceding annual congress.

Section 3. Delegates

A. Delegates Representing Affiliated Associations.

1. Each affiliated association shall be entitled to one (1) delegate for each fifty (50) of its members and optometric educator members, except that any student, honorary, associate, or provisional members shall not be counted at all, and any members, except optometric educator members, who pay less than the full time active member dues (not taking into account the reductions in dues permitted under Paragraphs C.8., F and G of Section 2 of Article I of these Bylaws) shall be counted as one-half (1/2) member. A member shall only be eligible to be counted in the foregoing calculation if the proper amount of dues owed by that member for the Last Quarter (as defined in Article II, Section 11) and all previous financial quarters have been paid and received (not merely postmarked) at this Association by the Credentialing Deadline (as defined in Article II, Section 11).

Any member who receives any dues waiver pursuant to the process described in Paragraph G of Section 2 of Article I of these Bylaws shall not be counted for credentialing purposes during the year following the year in which the waiver applied. However, an affiliated association having less than fifty (50) members under the foregoing calculation shall nonetheless be entitled to one (1) regular delegate.

2. The delegate strength of an affiliated association for the annual congress shall be determined from the records of this Association as of the last Business Day of the Last Quarter (as defined in Article II, Section 11).

3. Each affiliated association may also select one (1) alternate delegate for each delegate to which it is entitled under this section.

4. The president and secretary of each affiliated association, at least fifteen (15) days prior to the first day of the annual congress, shall certify to the secretary-treasurer of this Association the names of the delegates and alternate delegates who shall represent the affiliated association at the congress. The certification shall also state that all attributable quarterly dues of this Association collected by the affiliated association have been remitted to this Association by the Credentialing Deadline (as defined in Article II, Section 11).

B. Delegates Representing Student Members.

1. Student members at each school or college of optometry in the United States, accredited or pre-accredited by the Accreditation Council on Optometric Education as of May 31 of each year, shall be entitled to select one (1) delegate, and the affiliated association representing student members shall be entitled to three (3) delegates selected by such affiliated association.

2. Such student members and the affiliated association representing student members shall be entitled to select one (1) alternate delegate for each delegate to which they are entitled under this section.

C. Delegates Representing Sections.

Each section is permitted one (1) delegate. Each section shall elect from its membership one (1) delegate and one (1) alternate delegate.

D. Delegates at Special Congresses.

Each affiliated association, student members, and sections shall be entitled to the same number of delegates and alternate delegates at a special congress as at the immediately preceding congress. Delegates and alternate delegates at a special congress shall be selected from among those members eligible to serve as delegates or alternate delegates at the immediately preceding annual congress.
Section 4. Credentials Committee

No later than thirty (30) days before each annual congress, the president shall appoint a credentials committee composed of at least three (3) members. The credentials committee shall verify the credentials of all delegates to the congress and report to the congress for the purpose of seating the delegates and their alternates. Any dispute as to the number of delegates to which an affiliate is entitled or as to which delegates or alternate delegates are eligible to serve as delegates or alternate delegates shall be determined by the Credentials Committee, whose decision shall be final and not appealable.

Section 5. Voting and Debates

A. Each affiliated association shall be entitled to one (1) vote on any matter coming before the House for each ten (10) of its members and optometric educator members, except that any student, honorary, associate, or provisional members shall not be counted at all, and any members, except optometric educator members, who pay less than the full active member dues (not taking into account the reductions in dues permitted under Paragraphs C.8, F and G of Section 2 of Article I of these Bylaws) shall be counted as one-half (1/2) member. A member shall only be eligible to be counted in the foregoing calculation if the proper amount of dues owed by that member for the Last Quarter (as defined in Article II, Section 11) and all previous financial quarters have been paid and received (not merely postmarked) at this Association by the Credentialing Deadline (as defined in Article II, Section 11). Any member who receives any dues waiver pursuant to the process described in Paragraph G of Section 2 of Article I of these Bylaws shall not be counted for credentialing purposes during the year following the year in which the waiver applied. However, each affiliated association shall be entitled to at least one (1) vote. The voting strength of the delegations representing each affiliate association shall be determined from the records of this Association as of the last Business Day of the Last Quarter (as defined in Article II, Section 11). The delegation representing the student members shall be entitled to three (3) votes on any matter coming before the House. The total vote of each delegation may be cast by its delegate or delegates present when the vote is called.

B. Each delegate shall be entitled to the privileges of the floor and to participate in debates and make motions on any matter coming before the House.

C. In the event that a delegate is unable to attend a Congress or is otherwise absent from a session of the House, the delegation shall designate any of its alternate delegates to act in place of such absent delegate. A distinguished member or a member of the Board of Trustees who is an ex officio delegate shall not be entitled to designate an alternate delegate to act in the delegate’s place.

D. Distinguished members and members of the Board of Trustees who are ex officio delegates and delegates representing sections shall not be entitled to vote, but may attend sessions of the House and shall be entitled to participate in debates and make motions on any matter coming before the House.

E. All members who are not delegates may attend sessions of the House as observers, but shall not be entitled to participate in debate unless granted permission therefor by the presiding officer at the request of a delegate.

Section 6. Quorum and Procedures

A. Certified delegates representing a majority of the affiliated associations, shall constitute a quorum for the transaction of business at any session of the House of Delegates.

B. Except as may be otherwise required by statute or by the constitution or bylaws of this Association disposition of all matters coming before the House of Delegates shall be determined by a majority of the votes cast.

C. Except as may be otherwise required by the constitution or bylaws of this Association, all congresses shall be governed by the parliamentary rules and usages contained in the then current edition of Robert’s Rules of Order.

D. Whenever a vote is to be taken by roll call, the order of such voting shall be on an alphabetical basis beginning from a randomly selected affiliated association in the manner determined by the House of Delegates.

Section 7. Nominating Committee

A. There shall be a nominating committee composed of nine (9) members of this Association, one (1) of whom shall have served the previous year and shall be designated as chair. No affiliated association shall be represented on the nominating committee more often than once every two (2) years, provided, however, that in any year, one (1) member of the nominating committee of the previous year shall have been elected by that committee as chair for the next year. The nominating committee shall also select two alternates to serve in the event the new chair is unable to serve for the next year. The election for the next year’s chair and alternates shall be the last action of the nominating committee for each year. No affiliated association shall have more than one (1) member on the nominating committee at the same time. Any affiliated association with a candidate for an officer or trustee position shall not be represented on the nominating committee.

The names of eight (8) affiliated associations, other than that of the member of the previous year, shall be randomly selected in the manner determined by the House of Delegates. The names of eight (8) additional affiliated associations shall then be randomly selected in a similar manner as alternates for the eight (8) affiliated associations originally selected.

No later than January 1st of each year, the president of each of the eight (8) affiliated associations originally selected and the president of each of the eight (8) additional affiliated associations shall notify the Secretary-Treasurer of this Association in writing the name of the member selected by such affiliated association to serve as a member or alternate member of the nominating committee for that year’s annual congress. After such notification, if such an individual is unable to serve, an individual from an affiliated association selected as an alternate, in order of such selection, shall replace the individual unable to serve.

B. The nominating committee shall prepare a slate of nominees for election to office in this Association which it shall present to the House of Delegates no later than forty-eight (48) hours prior to the election. The report of the nominating committee shall not preclude any delegate from making a nomination for any office from the floor of the House of Delegates.

Section 8. Resolutions Committee

A. The president shall, no later than sixty (60) days prior to the first day of the annual congress, appoint one (1) or more resolutions committees as the president may deem necessary or appropriate. Each committee shall be composed of at least five (5) members of this Association, one (1) of whom shall be designated as chair by the president.
B. Each resolutions committee shall consider such proposed resolutions as may be referred to it in accordance with subparagraph C of this section and shall report to the House of Delegates those resolutions which it has approved either in the form referred to it or as modified or changed by the committee. If the committee makes significant substantive modifications or changes to a proposed resolution, it shall consult the originator prior to reporting the resolution to the House of Delegates.

C. Resolutions may be proposed by an affiliated association, by a section, by the House of Delegates, or by the Board of Trustees. An affiliated association or section shall deliver to the secretary-treasurer, at least fifteen (15) days prior to the first day of the annual congress, one (1) typewritten copy of all resolutions which such affiliated association or section proposes for adoption by the House of Delegates, and the secretary-treasurer shall deliver one (1) copy thereof to the chair of the appropriate resolutions committee. The Board of Trustees may at any time submit a proposed resolution to the secretary-treasurer who shall refer it to an appropriate resolutions committee, and the House of Delegates by a two-thirds (2/3) vote may similarly do so. Proposed resolutions which have not been referred to an appropriate resolutions committee in accordance with the provisions of this subparagraph shall not be considered by the House of Delegates.

D. Each resolutions committee shall report to the House of Delegates all proposed resolutions which it has approved, and a copy of each such proposed resolution, as approved by the committee, shall be made available to each delegate at least four (4) hours prior to its consideration by the House of Delegates. In the event that a resolutions committee does not report to the House of Delegates with approval a proposed resolution that has been referred to it, any delegate may, at the appropriate time, offer, from the floor, a motion that the House consider the proposed resolution, and if the House of Delegates shall approve the motion by a two-thirds (2/3) vote the House of Delegates shall thereupon give consideration to the proposed resolution.

Section 9. Powers

A. The House of Delegates shall have the power to enact, amend, and repeal the Constitution and Bylaws of the Association.

B. The House of Delegates shall have the power to grant, amend, suspend, or revoke affiliate status in the Association for any other association or group.

C. The House of Delegates shall have the power to create special committees of the Association.

D. The House of Delegates shall be the supreme policymaking body of the Association, and shall have the power to approve, amend, or rescind any policies established by the Board of Trustees.

Section 10. Duties

A. It shall be the duty of the House of Delegates to elect the elective officers and the trustees of the Association.

B. It shall be the duty of the House of Delegates to approve a budget for the Association.

C. It shall be the duty of the House of Delegates to approve the location of the annual congress.

D. It shall be the duty of the House of Delegates to receive and act, as deemed appropriate, upon reports of any committees established by the House of Delegates.

Section 11. Definitions

A. For purposes of Article II of these Bylaws, "Last Quarter" shall mean the following for any given year:

1. If the first day of such year's annual congress is in January or February, the third financial quarter of the previous year.

2. If the first day of such year's annual congress is in March, April, or May, the fourth financial quarter of the previous year.

3. If the first day of such year's annual congress is in June, July, or August, the first financial quarter of such year.

4. If the first day of such year's annual congress is in September, October, or November, the second financial quarter of such year.

5. If the first day of such year's annual congress is in December, the third financial quarter of such year.

B. For purposes of Article II of these Bylaws, "Credentialing Deadline" shall mean the following for any given year:

1. If the first day of such year's annual congress is in January or February, "Credentialing Deadline" shall mean 5:00 p.m. Central Time on October 31 of the previous year unless October 31 falls on a weekend or federal holiday, in which case it shall mean the following Business Day.

2. If the first day of such year's annual congress is in March, April, or May, "Credentialing Deadline" shall mean 5:00 p.m. Central Time on January 31 of such year unless January 31 falls on a weekend or federal holiday, in which case it shall mean the following Business Day.

3. If the first day of such year's annual congress is in June, July, or August, "Credentialing Deadline" shall mean 5:00 p.m. Central Time on April 30 of such year unless April 30 falls on a weekend or federal holiday, in which case it shall mean the following Business Day.

4. If the first day of such year's annual congress is in September, October, or November, "Credentialing Deadline" shall mean 5:00 p.m. Central Time on July 31 of such year unless July 31 falls on a weekend or federal holiday, in which case it shall mean the following Business Day.

5. If the first day of such year's annual congress is in December, "Credentialing Deadline" shall mean 5:00 p.m. Central Time on October 31 of such year unless October 31 falls on a weekend or federal holiday, in which case it shall mean the following Business Day.

C. For purposes of Article II of these Bylaws, "Business Day" shall mean any Monday, Tuesday, Wednesday, Thursday, or Friday that is not a federal holiday.

ARTICLE III

BOARD OF TRUSTEES

Section 1. Election, Term of Office, Removal, and Vacancies

A. The Board of Trustees shall be composed of eleven (11) members, five (5) of whom shall be the officers of this Association, and six (6) of whom shall be elected as trustees by the House of Delegates. No person shall be a member of the Board of Trustees who is not a licensed optometrist who is a member in good standing of this Association. A member in good standing shall mean a member who is not delinquent in paying dues to this Association, as required by these Bylaws.

B. Two (2) trustees shall be elected by the House of Delegates at each annual congress for three (3) year terms.
No person shall be eligible for election to more than two (2) successive three (3) year terms as trustee.

C. In the event of a vacancy occurring on the Board of Trustees from among the elected members, the next junior available past-president after the immediate past-president shall become a trustee, to hold such position until the next annual congress, at which time a trustee shall be elected for the remainder of the term.

D. The balloting in the House of Delegates for trusteeships having different terms shall be conducted separately.

E. The balloting for all nominees for the two (2) trusteeships to be filled under subparagraph B hereof shall be conducted at the same time. Each delegate shall be entitled to twice the number of votes to which the delegate would otherwise be entitled, and each delegate, who votes, must vote for two (2) candidates, casting no more than the vote to which the delegate would otherwise be entitled for any one (1) candidate.

F. In the event that there are two (2) trusteeships having the same remaining term open under subparagraph C hereof, the balloting for such trusteeships shall be conducted under the procedures set forth in subparagraph E hereof.

G. An officer or trustee may, in accordance with the procedure set forth in this paragraph, be removed from his or her position by a three-quarters (3/4) vote of the Board of Trustees (not including the officer or trustee under consideration) for a serious or repeat violation of the policies or procedures of the Association or other serious failure to fulfill the obligations of the office to which that individual has been elected. Notice of the meeting at which a vote to remove an officer or trustee will be held must be given to the Board of Trustees at least 30 days prior to the date of the meeting. The notice must specify that a vote to remove a named officer or trustee will be held at the meeting. An officer or director who is subject to a removal vote must be given the opportunity to present his or her position to the Board of Trustees before a vote is taken. Any removal of an officer or trustee shall take place immediately and must be promptly reported to the House of Delegates, along with the reasons therefor. There shall be no appeal from a decision of the Board of Trustees under this paragraph.

Section 2. Meeting and Quorum

A. The Board of Trustees shall meet at least once each year at a time determined by the president and at such other times as are determined to be necessary by the president or Board of Trustees. Meetings of the Board may be called by the president, and the president shall call a meeting at the written request of three (3) members of the Board of Trustees. Such meetings shall be held at such times and places, to be fixed by the president, as shall be convenient for the transaction of the business for which the meeting is called.

B. At all meetings of the Board six (6) members shall constitute a quorum for the transaction of business.

C. Except as may be otherwise required by statute or by the constitution or bylaws of this Association, disposition of all matters coming before the Board shall be determined by a majority of the votes cast.

Section 3. Powers and Duties

A. The Board of Trustees shall be responsible for the management of the business and affairs of this Association in accordance with general policy and within the budget established by the House of Delegates. In carrying out its functions, the Board shall have such rights and perform such duties as are prescribed by law governing directors of corporations or as may be provided in the constitution of this Association or in these bylaws.

B. Except as may be otherwise provided by statute or in the constitution of this Association or in these bylaws, the Board of Trustees is authorized to establish such organizational structure of the Association as it deems necessary or desirable for the performance of the activities of the Association.

C. The Board shall select a certified public accountant to audit annually the books and accounts of this Association.

D. The Board shall make and establish policies, as deemed necessary, for the operation and management of the Association, and such Board of Trustee actions shall be subject to the review of the House of Delegates.

ARTICLE IV
OFFICERS

Section 1. Election, Terms of Office and Vacancies

A. The officers of this Association shall be a president, a president-elect, a vice-president, a secretary-treasurer, and the immediate past-president.

B. Except for the president and immediate past-president, officers shall be elected annually by the House of Delegates at the annual congress. At the completion of the president's term of office, the president shall automatically become the immediate past-president, and the president-elect shall automatically become the president.

C. Officers shall serve for a term of one (1) year or until their successors are installed. No individual, shall be elected to the same office for more than one term.

D. If the office of immediate past-president becomes vacant for any reason, the next junior available past-president shall act as immediate past-president. Any vacancy occurring in any other office by reason of death, resignation or otherwise may be filled by the Board of Trustees, and any officer so appointed may serve until the next election. If the vacancy is in the office of president-elect, the person designated by the Board of Trustees to serve as president-elect shall not automatically succeed to the presidency. At the next election, the office of president shall be deemed to be open, and the House of Delegates shall elect a person to serve as president.

Section 2. Duties

A. The president shall be the official representative of this Association in its contacts with governmental, civic, business and other professional organizations. The president may attend to these matters personally or may designate a representative to do so. In addition to such other duties as may be provided in the constitution or elsewhere in these bylaws, the president shall preside at all congresses, or may designate a member of the Association to act as presiding officer; shall preside at meetings of the Board of Trustees, or may designate a member of the Board to act as presiding officer; except as may otherwise be provided in these bylaws, the president shall appoint the chair and the members of all subordinate bodies and shall fill any vacancies that may arise in such position; the president may, for the period of the administrative year of such presidency, establish, prescribe the functions and appoint the members of such special or ad hoc committees or project teams or task forces as deemed necessary or desirable; the
A. The Accreditation Council on Optometric Education shall be composed of thirteen (13) members, eleven (11) of whom shall be members of this Association. With respect to the members of the Council who are members of this Association: Four (4) members shall be optometrists of outstanding professional experience who are not compensated administrators, faculty or consultants of, or affiliated with the governance of any school or college of optometry and who are not members of a state board of optometry, programs of residency optometric education, and one (1) shall be associated with an optometric technician program accredited by the Accreditation Council on Optometric Education or a graduate of such a program. With respect to the members of the Council who are optometrists, all must be consultants of the Accreditation Council on Optometric Education in good standing at the time of their initial appointment. The members of the Council who are not members of this Association shall be public members who meet the requirements specified by the agencies that formally recognize the Council as an accrediting body.

B. All members of the Accreditation Council on Optometric Education shall be appointed by the president with the consent of the Board of Trustees. The two (2) ARBO members shall be appointed from a list of four (4) nominees for each appointment submitted to the president by ARBO, and the two (2) educator-members and the two (2) residency program-related member shall be appointed from a list of four (4) nominees for each appointment submitted to the president by the optometric educational programs accredited by the Accreditation Council on Optometric Education.

C. The members of the Council shall be appointed for a term of three (3) years. No person shall serve more than three (3) consecutive three (3) year terms.

D. In the event of a vacancy on the Accreditation Council on Optometric Education, the president, with the consent of the Board of Trustees, shall appoint in accordance with the provisions of subparagraphs A and B of this section, a successor to complete the unexpired portion of the term of office. If an educator-member ceases to be associated with an accredited optometric educational program, that position on the Accreditation Council on Optometric Education shall automatically be deemed vacant.

E. The Accreditation Council on Optometric Education shall concern itself with the quality of optometric and paraoptometric education including, but not limited to, counseling, advising, and acting in matters relating to residency programs, the type and amount of educational training, admission requirements, curricula, faculty, equipment, and matters of similar nature. It shall have the authority to inspect and accredit schools and colleges of optometry, programs of residency optometric education, and programs of paraoptometric education.

Section 2. Judicial Council

A. The Judicial Council shall be composed of five (5) members of this Association. The immediate past-president of the Association shall be a member and the chair of the Council, and at least two (2) other members shall be past-presidents of this Association. All members of the Council, other than the chair, shall be appointed by the president with the consent of the Board of Trustees. All members of the Council shall serve for a term of three (3) years.

B. In the event of a vacancy on the Judicial Council, the president, with the consent of the Board of Trustees, shall appoint a successor to complete the unexpired portion of the term of office.

C. The Judicial Council shall study and review all resolutions and substantive motions adopted by the House of Delegates at a congress. Resolutions and substantive motions adopted by the House of Delegates shall be mailed to the Judicial Council within thirty (30) days after the close of the congress. Within sixty (60) days after receipt thereof, the Judicial Council shall, with respect to each resolution and substantive motion, determine whether it shall become effective, or whether it shall be referred back to the House of Delegates, without alteration or amendment, for reconsideration at the next annual congress.

D. It shall require a four-fifths (4/5) vote of the Judicial Council to refer a resolution or substantive motion back to the House of Delegates for reconsideration. In the absence of a four-fifths (4/5) vote of the Judicial Council to refer a resolution or substantive motion back to the House, or if the Council fails to act on a resolution or substantive motion within sixty (60) days after receipt thereof, the resolution or substantive motion shall become effective.
ARTICLE VI

SECTIONS

Section 1.

A. The House of Delegates, by two-thirds (2/3) of the votes cast may create a new section, combine existing sections, change the name of sections, or discontinue sections after a report by the Board of Trustees on the proposal. At least one hundred twenty (120) days before the meeting of the House of Delegates at which action on the proposal is taken, the proponents must file with the secretary-treasurer a statement setting forth:
   (1) The need for the proposed section.
   (2) The contemplated purpose of the section which must be within the objects of the Association and must not substantially conflict with the purpose of any existing section or committee of the Association.
   (3) The proposed bylaws of the section, including a description of its scope and function, which must not be inconsistent with the Constitution and Bylaws of this Association.

(4) The proposed budget for the section for the first year of its operation.

(5) A list of present or prospective members of the Association who sign statements that they will apply for membership in this section.

B. Notice must be given to the members of the Association at least ninety (90) days before the meeting of the House of Delegates at which a proposal to establish, combine, discontinue, or change the name of a section is to be considered.

C. Members of sections must be members of the Association and must meet the requirements of the bylaws of the respective sections.

D. Each section shall elect its own officers in the manner provided for in its bylaws.

E. Amendments to the bylaws of a section shall not become effective until approved by the House of Delegates upon recommendation of the Board of Trustees.

F. Each section shall establish an annual budget, and annual dues to cover the activities of the section. The establishment of the budget and dues of a section shall not become effective until approved by the House of Delegates upon recommendation of the Board of Trustees.

G. A meeting of each section shall be held at least once a year.

ARTICLE VII

EXECUTIVE DIRECTOR

Section 1.

The Board of Trustees may engage the services of a person to act as executive director of the Association. Such person need not be an optometrist or a member of this Association.

Section 2.

The Board shall determine the compensation of the executive director and may, on behalf of the Association, enter into a contract of employment with such executive director for a term not to exceed three (3) years; provided, however, that successive contracts may be entered into with the same person.

Section 3.

The executive director shall administer the business and affairs, and supervise the operation, of the Association under the general policy guidance of the Board of Trustees. The executive director shall perform such duties as are ordinarily performed by persons in similar positions and such other duties as may from time to time be assigned by the Board of Trustees.

ARTICLE VIII

MISCELLANEOUS ADMINISTRATION PROVISIONS

Section 1.

All officers, trustees, and chair and members of subordinate bodies of this Association, shall, when away from their homes on authorized official business of the Association, be reimbursed for transportation expenses and other expenditures as defined and fixed by the Board of Trustees.

Section 2.
No person shall, on behalf of the Association assume or incur any expenses or liability, or enter into any contract or agreement involving the expenditure of money, except in accordance with procedures established by the Board of Trustees.

Section 3.

Any officer or trustee of this Association may be removed by the House of Delegates at any congress by a three-fourths (3/4) majority of the votes cast.

Section 4.

The Association shall indemnify and hold harmless each officer and trustee, now or hereafter serving the Association, from and against any and all claims and liabilities to which the individual may be or become subject by reason of now or hereafter being or having heretofore been an officer or trustee of this Association, or by reason of the individual’s alleged acts or omissions as an officer or trustee as aforesaid, and shall reimburse each officer and trustee of this Association for all legal and other expenses reasonably incurred by the officer or trustee in connection with defending against any such claims or liabilities, provided, however, that no officer or trustee shall be indemnified against or be reimbursed for any expenses incurred in defending against any claim or liability arising out of the officer’s or trustee’s own negligence or willful misconduct. The foregoing rights of officers and trustees shall not be exclusive of other rights to which they may be entitled lawfully.

Section 5.

Whenever these Bylaws require that notice be given to any person or organization, such notice may be given by any written means, whether physical, electronic, digital, or otherwise.

ARTICLE IX
AMENDMENTS

The bylaws may be amended by the House of Delegates by two-thirds (2/3) of the votes cast at any congress, provided that the proposed amendment had previously been recommended by a convention or the governing board of an affiliated association, or by the Board of Trustees of this Association, and that one (1) copy of the proposed amendment had been received by the secretary-treasurer of this Association not less than one hundred (100) days before the commencement of the congress which is to consider and act on the proposed amendment. No less than ninety (90) days before said congress, the secretary-treasurer of this Association shall deliver to the president, secretary, and official office of each affiliated association a copy of the proposed amendment with a notice stating that the proposed amendment will be submitted for consideration at the said congress. At the discretion of the secretary-treasurer of this Association, delivery of the proposed amendments under this Article may be made by any written means, whether physical, electronic, digital, or otherwise provided that such means provides the secretary-treasurer with documentation of verifiable receipt of such notice, which shall be maintained with the Association’s records. Unless specifically stated to the contrary, all amendments to the Bylaws adopted by the House of Delegates shall become effective on January 1 of the calendar year which immediately follows the House of Delegates which approved such amendment.
FINANCIAL REPORT
### American Optometric Association

#### 2024 Budget by Category

<table>
<thead>
<tr>
<th>Revenues</th>
<th>2024 BUDGET</th>
<th>2023 BUDGET</th>
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<tr>
<td>Membership Dues</td>
<td>$18,595,509</td>
<td>$18,600,080</td>
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<tr>
<td>Contributions / Industry Support</td>
<td>3,824,500</td>
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<td>Registration Income</td>
<td>1,411,020</td>
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<td>ACOE Site Visits/Fees</td>
<td>866,546</td>
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<td>Sales - Printed Materials</td>
<td>231,000</td>
<td>264,000</td>
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<td>Exhibit Booth / Meeting</td>
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<td>Advertising</td>
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<td>Rental Income</td>
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<td>Salaries &amp; Benefits</td>
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<td>Software, Purchases &amp; Printing</td>
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<td>Rent, Utilities, Insurance &amp; Property Taxes</td>
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<td>Stipends, Honorariums, &amp; Payments to Affiliates</td>
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<td>Advertising &amp; Promotions</td>
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<td>Awards, Grants &amp; Contributions</td>
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<td>Other Expenses</td>
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<td><strong>Total Expenses</strong></td>
<td><strong>$27,336,939</strong></td>
<td><strong>$28,756,070</strong></td>
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| Investment Income                             | 1,100,000   | 960,000     |
| Depreciation and Amortization                 | (695,359)   | (635,477)   |
| Interest Expense                              | (231,072)   | (199,072)   |
| **Subtotal**                                  | **$173,569** | **$125,451** |

<p>| Total Earnings                                 | <strong>$ (121,343)</strong> | <strong>$ (1,883,526)</strong> |</p>
<table>
<thead>
<tr>
<th></th>
<th>REVENUE</th>
<th>EXPENSE</th>
<th>NET</th>
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<tr>
<td>FEDERAL, THIRD PARTY, &amp; AOAPAC</td>
<td>1,318,000</td>
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<td>STATE GOVERNMENT RELATIONS</td>
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<td>CLINICAL CARE</td>
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<td>ACCREDITATION COUNCIL ON OPTOMETRIC EDUCATION</td>
<td>866,546</td>
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<td>COMMUNICATIONS AND MARKETING</td>
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<td>FINANCE &amp; DUES ACCOUNTING</td>
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<td>BOARD OF TRUSTEES</td>
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<td>1,476,012</td>
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<td>ALX &amp; STL RENT</td>
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<td>MAIL &amp; MARKETPLACE</td>
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<td>HUMAN RESOURCES</td>
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<td>IT</td>
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<td>(2,259,351)</td>
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<td>RESEARCH AND INFORMATION</td>
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<td>INDUSTRY RELATIONS</td>
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<td>VOLUNTEER CONFERENCES</td>
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<td>OPTOMETRY’S MEETING®</td>
<td>3,588,020</td>
<td>3,602,750</td>
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<tr>
<td><strong>GRAND TOTAL</strong></td>
<td><strong>$ 28,142,027</strong></td>
<td><strong>$ 28,263,370</strong></td>
<td><strong>$ (121,343)</strong></td>
</tr>
</tbody>
</table>
American Optometric Association
(Parent-Only)

Independent Auditor’s Report and Financial Statements

December 31, 2023 and 2022
## Contents

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**Parent-Only Financial Statements**

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- Statements of Activities ........................................................................... 5
- Statements of Functional Expenses ........................................................ 6
- Statements of Cash Flows ........................................................................ 8
- Notes to Financial Statements ................................................................. 9
Independent Auditor’s Report

Board of Trustees
American Optometric Association
St. Louis, Missouri

Opinion
We have audited the parent-only financial statements of American Optometric Association, which comprise the parent-only statements of financial position as of December 31, 2023 and 2022, and the related parent-only statements of activities, functional expenses, and cash flows for the years then ended, and the related notes to the parent-only financial statements.

In our opinion, the accompanying parent-only financial statements present fairly, in all material respects, the parent-only financial position of American Optometric Association as of December 31, 2023 and 2022, and the changes in its net assets and its cash flows for the years then ended in accordance with accounting principles generally accepted in the United States of America.

Basis for Opinion
We conducted our audits in accordance with auditing standards generally accepted in the United States of America (GAAS). Our responsibilities under those standards are further described in the “Auditor’s Responsibilities for the Audit of the Financial Statements” section of our report. We are required to be independent of American Optometric Association and to meet our other ethical responsibilities, in accordance with the relevant ethical requirements relating to our audits. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

Emphasis of Matter
We draw attention to Note 1 of the parent-only financial statements, which describes the basis of presentation. These financial statements are prepared by the American Optometric Association as parent-only financial statements. Parent-only financial statements are not intended to be the general purpose financial statements and should be read in conjunction with the American Optometric Association’s consolidated financial statements. Our opinion is not modified with respect to this matter.

Other Matter
Our report is intended solely for the information and use of the Board of Trustees and management and is not intended to be and should not be used by anyone other than these specified parties.

Responsibilities of Management for the Parent-Only Financial Statements
Management is responsible for the preparation and fair presentation of the parent-only financial statements in accordance with accounting principles generally accepted in the United States of America, and for the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of parent-only financial statements that are free from material misstatement, whether due to fraud or error.
In preparing the parent-only financial statements, management is required to evaluate whether there are conditions or events, considered in the aggregate, that raise substantial doubt about American Optometric Association’s ability to continue as a going concern within one year after the date that these parent-only financial statements are available to be issued.

**Auditor’s Responsibilities for the Audit of the Parent-Only Financial Statements**

Our objectives are to obtain reasonable assurance about whether the parent-only financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor’s report that includes our opinion. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with GAAS will always detect a material misstatement when it exists. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Misstatements are considered material if there is a substantial likelihood that, individually or in the aggregate, they would influence the judgment made by a reasonable user based on the parent-only financial statements.

In performing an audit in accordance with GAAS, we:

- Exercise professional judgment and maintain professional skepticism throughout the audit.
- Identify and assess the risks of material misstatement of the parent-only financial statements, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding the amounts and disclosures in the parent-only financial statements.
- Obtain an understanding of internal control relevant to the audit 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 American Optometric Association’s internal control. Accordingly, no such opinion is expressed.
- Evaluate the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluate the overall presentation of the parent-only financial statements.
- Conclude whether, in our judgment, there are conditions or events, considered in the aggregate, that raise substantial doubt about American Optometric Association’s ability to continue as a going concern for a reasonable period of time.

We are required to communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit, significant audit findings, and certain internal control-related matters that we identified during the audit.

**Forvis Mazars, LLP**

St. Louis, Missouri
June 7, 2024
## ASSETS

### Current Assets

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<th>2023</th>
<th>2022</th>
</tr>
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<tbody>
<tr>
<td>Cash</td>
<td>$1,553,600</td>
<td>$1,189,641</td>
</tr>
<tr>
<td>Investments</td>
<td>24,154,621</td>
<td>22,958,229</td>
</tr>
<tr>
<td>Dues receivable, net of allowance: $667,100 in 2023 and $600,202 in 2022</td>
<td>2,116,918</td>
<td>2,016,810</td>
</tr>
<tr>
<td>Accounts and other receivables, net of allowance: $9,413 in 2023 and $18,730 in 2022</td>
<td>795,270</td>
<td>1,482,506</td>
</tr>
<tr>
<td>Contributions receivable, net of allowance: $0 in 2023 and $9,750 in 2022</td>
<td>-</td>
<td>7,750</td>
</tr>
<tr>
<td>Printed materials for resale</td>
<td>39,521</td>
<td>35,460</td>
</tr>
<tr>
<td>Other current assets</td>
<td>774,147</td>
<td>820,416</td>
</tr>
</tbody>
</table>

Total current assets: $29,434,077 in 2023, $28,510,812 in 2022

### Investment in Subsidiary

<table>
<thead>
<tr>
<th></th>
<th>2023</th>
<th>2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>Investment in Subsidiary</td>
<td>950,603</td>
<td>636,497</td>
</tr>
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</table>

### Property and Equipment, Net

<table>
<thead>
<tr>
<th></th>
<th>2023</th>
<th>2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>Land</td>
<td>978,647</td>
<td>978,647</td>
</tr>
<tr>
<td>Buildings and improvements</td>
<td>11,014,353</td>
<td>11,051,995</td>
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<tr>
<td>Furniture and equipment</td>
<td>4,187,966</td>
<td>4,180,902</td>
</tr>
</tbody>
</table>

Total property and equipment, net: $16,180,966 in 2023, $16,211,544 in 2022

Less accumulated depreciation: $8,898,773 in 2023, $8,434,334 in 2022

Total property and equipment, net: $7,282,193 in 2023, $7,777,210 in 2022

### Right-of-Use Assets

<table>
<thead>
<tr>
<th></th>
<th>2023</th>
<th>2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>Right-of-Use Assets</td>
<td>45,773</td>
<td>75,196</td>
</tr>
</tbody>
</table>

### Dividend on Deposit

<table>
<thead>
<tr>
<th></th>
<th>2023</th>
<th>2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dividend on Deposit</td>
<td>4,332,803</td>
<td>4,332,803</td>
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</tbody>
</table>

### Interest Rate Swap Agreement

<table>
<thead>
<tr>
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<th>2023</th>
<th>2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>Interest Rate Swap Agreement</td>
<td>161,347</td>
<td>245,434</td>
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</table>

### Other Long-Term Assets

<table>
<thead>
<tr>
<th></th>
<th>2023</th>
<th>2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>Other Long-Term Assets</td>
<td>-</td>
<td>13,370</td>
</tr>
</tbody>
</table>

Total assets: $42,206,796 in 2023, $41,591,322 in 2022

See Notes to Parent-Only Financial Statements
<table>
<thead>
<tr>
<th>LIABILITIES AND NET ASSETS</th>
<th>2023</th>
<th>2022</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Current Liabilities</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bank line of credit</td>
<td>$4,000,000</td>
<td>$1,000,000</td>
</tr>
<tr>
<td>Accounts payable</td>
<td>1,228,871</td>
<td>1,580,808</td>
</tr>
<tr>
<td>Accrued liabilities</td>
<td>408,587</td>
<td>391,512</td>
</tr>
<tr>
<td>Current maturities of long-term debt</td>
<td>533,333</td>
<td>533,333</td>
</tr>
<tr>
<td>Deferred revenue - membership dues</td>
<td>523,564</td>
<td>407,405</td>
</tr>
<tr>
<td>Deferred revenue - other</td>
<td>1,286,986</td>
<td>1,587,242</td>
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<tr>
<td>Current portion of lease liability</td>
<td>21,086</td>
<td>29,423</td>
</tr>
<tr>
<td>Total current liabilities</td>
<td>8,002,427</td>
<td>5,529,723</td>
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<tr>
<td><strong>Dividend on Deposit Liability</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>8,080,295</td>
<td>8,332,385</td>
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<tr>
<td><strong>Long-Term Lease Liability</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>24,687</td>
<td>45,773</td>
</tr>
<tr>
<td><strong>Long-Term Debt, Net</strong></td>
<td>3,712,210</td>
<td>4,242,846</td>
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<tr>
<td>Total liabilities</td>
<td>19,819,619</td>
<td>18,150,727</td>
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<tr>
<td><strong>Net Assets</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Without donor restrictions</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Designated by board</td>
<td>(5,761,280)</td>
<td>(4,567,604)</td>
</tr>
<tr>
<td>Undesignated</td>
<td>28,148,457</td>
<td>28,008,199</td>
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<tr>
<td>Total net assets without donor restrictions</td>
<td>22,387,177</td>
<td>23,440,595</td>
</tr>
<tr>
<td>Total liabilities and net assets</td>
<td>$42,206,796</td>
<td>$41,591,322</td>
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</tbody>
</table>
American Optometric Association  
(Parent-Only)  
Statements of Activities  
Years Ended December 31, 2023 and 2022

<table>
<thead>
<tr>
<th></th>
<th>2023</th>
<th>2022</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Revenues, Gains and Other Support</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Membership dues</td>
<td>$ 18,547,308</td>
<td>$ 18,588,742</td>
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<tr>
<td>Contributions and industry support</td>
<td>3,490,221</td>
<td>3,311,978</td>
</tr>
<tr>
<td>Registration income</td>
<td>1,256,809</td>
<td>1,217,507</td>
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<tr>
<td>ACOE site visits and fees</td>
<td>862,608</td>
<td>834,100</td>
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<tr>
<td>Sale of printed materials</td>
<td>205,025</td>
<td>221,447</td>
</tr>
<tr>
<td>Exhibit booths and meetings</td>
<td>1,009,654</td>
<td>1,107,203</td>
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<tr>
<td>Royalties income</td>
<td>60,232</td>
<td>57,041</td>
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<tr>
<td>Program revenue</td>
<td>89,600</td>
<td>98,225</td>
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<tr>
<td>Advertising</td>
<td>224,449</td>
<td>194,554</td>
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<tr>
<td>Rental income</td>
<td>9,492</td>
<td>9,492</td>
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<tr>
<td>Investment return, net</td>
<td>3,038,409</td>
<td>(1,643,582)</td>
</tr>
<tr>
<td>Change in fair value of interest rate swap agreement</td>
<td>(84,087)</td>
<td>602,087</td>
</tr>
<tr>
<td>Other revenue</td>
<td>507,465</td>
<td>473,590</td>
</tr>
<tr>
<td><strong>Total revenues, gains and other support</strong></td>
<td>$ 29,217,185</td>
<td>$ 25,072,384</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>2023</th>
<th>2022</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Expenses</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Salaries and benefits</td>
<td>10,453,208</td>
<td>9,481,264</td>
</tr>
<tr>
<td>Phone, copy and supplies</td>
<td>380,689</td>
<td>404,932</td>
</tr>
<tr>
<td>Software, purchases and printing</td>
<td>1,039,118</td>
<td>904,225</td>
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<tr>
<td>Rent, utilities, insurance and property taxes</td>
<td>817,522</td>
<td>687,431</td>
</tr>
<tr>
<td>Consultant, legal and professional fees</td>
<td>6,422,672</td>
<td>6,515,526</td>
</tr>
<tr>
<td>Travel expenses</td>
<td>2,918,949</td>
<td>1,835,430</td>
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<tr>
<td>Meeting expenses</td>
<td>2,902,153</td>
<td>2,411,791</td>
</tr>
<tr>
<td>Food functions</td>
<td>1,807,984</td>
<td>1,127,670</td>
</tr>
<tr>
<td>Stipends, honorariums and payments to affiliates</td>
<td>1,137,175</td>
<td>1,050,161</td>
</tr>
<tr>
<td>Advertising and promotions</td>
<td>302,372</td>
<td>256,761</td>
</tr>
<tr>
<td>Awards, grants and contributions</td>
<td>568,348</td>
<td>707,200</td>
</tr>
<tr>
<td>Depreciation and amortization</td>
<td>704,097</td>
<td>701,353</td>
</tr>
<tr>
<td>Interest expense</td>
<td>306,650</td>
<td>222,537</td>
</tr>
<tr>
<td>Other expenses</td>
<td>928,830</td>
<td>804,323</td>
</tr>
<tr>
<td><strong>Total expenses</strong></td>
<td>$ 30,584,709</td>
<td>$ 26,986,415</td>
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</table>

<table>
<thead>
<tr>
<th></th>
<th>2023</th>
<th>2022</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Change in Net Assets From Operations</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Equity in undistributed earnings of subsidiary</td>
<td>314,106</td>
<td>379,517</td>
</tr>
<tr>
<td><strong>Change in Net Assets</strong></td>
<td>(1,367,524)</td>
<td>(1,914,031)</td>
</tr>
<tr>
<td><strong>Net Assets, Beginning of Year</strong></td>
<td>23,440,595</td>
<td>24,975,109</td>
</tr>
<tr>
<td><strong>Net Assets, End of Year</strong></td>
<td>$ 22,387,177</td>
<td>$ 23,440,595</td>
</tr>
</tbody>
</table>

See Notes to Parent-Only Financial Statements
### Statement of Functional Expenses

**Year Ended December 31, 2023**

<table>
<thead>
<tr>
<th>Program Expenses</th>
<th>Advocacy</th>
<th>Communication &amp; Publications</th>
<th>Membership Services</th>
<th>Occupancy Expenses</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Expenses</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Salaries &amp; Benefits</td>
<td>$3,216,642</td>
<td>$2,871,124</td>
<td>$1,070,983</td>
<td>$442,433</td>
<td>$2,852,026</td>
</tr>
<tr>
<td>Phone, Copy &amp; Supplies</td>
<td>102,204</td>
<td>62,644</td>
<td>59,409</td>
<td>54,228</td>
<td>146,803</td>
</tr>
<tr>
<td>Software, Purchases &amp; Printing</td>
<td>500,335</td>
<td>75,832</td>
<td>69,991</td>
<td>74,896</td>
<td>284,521</td>
</tr>
<tr>
<td>Rent, Utilities, Insurance &amp; Property Taxes</td>
<td>20,153</td>
<td>7,921</td>
<td>1,120</td>
<td>162,192</td>
<td>1,667,195</td>
</tr>
<tr>
<td>Consultant, Legal &amp; Professional Fees</td>
<td>510,190</td>
<td>2,293,859</td>
<td>2,938,554</td>
<td>366,702</td>
<td>78,024</td>
</tr>
<tr>
<td>Meeting Expenses</td>
<td>507,099</td>
<td>303,584</td>
<td>15,077</td>
<td>2,059,712</td>
<td>365,111</td>
</tr>
<tr>
<td>Food Functions</td>
<td>278,881</td>
<td>161,098</td>
<td>1,580</td>
<td>1,340,186</td>
<td>26,239</td>
</tr>
<tr>
<td>Depreciation and Amortization</td>
<td>70,733</td>
<td>7,921</td>
<td>1,120</td>
<td>162,192</td>
<td>1,667,195</td>
</tr>
<tr>
<td>Other Expenses</td>
<td>548,988</td>
<td>238,500</td>
<td>5,545</td>
<td>60,603</td>
<td>5,742</td>
</tr>
<tr>
<td>Interest Expense</td>
<td>124,070</td>
<td>2,293,859</td>
<td>2,938,554</td>
<td>366,702</td>
<td>78,024</td>
</tr>
<tr>
<td>Stipends, Honorariums, &amp; Payments to Affiliates</td>
<td>821,462</td>
<td>133,514</td>
<td>256,761</td>
<td>302,372</td>
<td>548,896</td>
</tr>
<tr>
<td>Total expenses</td>
<td>$8,148,611</td>
<td>$6,593,725</td>
<td>$4,193,299</td>
<td>$6,374,000</td>
<td>$1,430,923</td>
</tr>
</tbody>
</table>

**Note:** See Notes to Parent-Only Financial Statements
<table>
<thead>
<tr>
<th>Year Ended December 31, 2023</th>
<th>Year Ended December 31, 2022</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Program Expenses</strong></td>
<td><strong>Program Expenses</strong></td>
</tr>
<tr>
<td><strong>General</strong></td>
<td><strong>Communication &amp; Conferences</strong></td>
</tr>
<tr>
<td><strong>General</strong></td>
<td><strong>Communication &amp; Conferences</strong></td>
</tr>
<tr>
<td><strong>Occupancy</strong></td>
<td><strong>Advertising &amp; Promotion</strong></td>
</tr>
<tr>
<td><strong>Occupancy</strong></td>
<td><strong>Advertising &amp; Promotion</strong></td>
</tr>
<tr>
<td><strong>Expenses</strong></td>
<td><strong>Advocacy</strong></td>
</tr>
<tr>
<td><strong>Expenses</strong></td>
<td><strong>Advocacy</strong></td>
</tr>
<tr>
<td><strong>Administration</strong></td>
<td><strong>Membership</strong></td>
</tr>
<tr>
<td><strong>Administration</strong></td>
<td><strong>Membership</strong></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>Total</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Year Ended December 31, 2023</th>
<th>Year Ended December 31, 2022</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Program Expenses</strong></td>
<td><strong>Program Expenses</strong></td>
</tr>
<tr>
<td><strong>General</strong></td>
<td><strong>Communication &amp; Conferences</strong></td>
</tr>
<tr>
<td><strong>General</strong></td>
<td><strong>Communication &amp; Conferences</strong></td>
</tr>
<tr>
<td><strong>Occupancy</strong></td>
<td><strong>Advertising &amp; Promotion</strong></td>
</tr>
<tr>
<td><strong>Occupancy</strong></td>
<td><strong>Advertising &amp; Promotion</strong></td>
</tr>
<tr>
<td><strong>Expenses</strong></td>
<td><strong>Advocacy</strong></td>
</tr>
<tr>
<td><strong>Expenses</strong></td>
<td><strong>Advocacy</strong></td>
</tr>
<tr>
<td><strong>Administration</strong></td>
<td><strong>Membership</strong></td>
</tr>
<tr>
<td><strong>Administration</strong></td>
<td><strong>Membership</strong></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>Total</strong></td>
</tr>
</tbody>
</table>

**American Optometric Association**

**Statement of Functional Expenses**

**Year Ended December 31, 2022**

See Notes to Parent-Only Financial Statements.
## American Optometric Association

### (Parent-Only)

#### Statements of Cash Flows

**Years Ended December 31, 2023 and 2022**

<table>
<thead>
<tr>
<th></th>
<th>2023</th>
<th>2022</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Operating Activities</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Change in net assets</td>
<td>(1,053,418)</td>
<td>(1,534,514)</td>
</tr>
<tr>
<td>Items not requiring (providing) cash</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Depreciation and amortization</td>
<td>704,097</td>
<td>701,351</td>
</tr>
<tr>
<td>Noncash operating lease expense</td>
<td>29,423</td>
<td>36,580</td>
</tr>
<tr>
<td>Gain on disposition of property and equipment</td>
<td>-</td>
<td>(140)</td>
</tr>
<tr>
<td>Net realized and unrealized losses (gains) on investments</td>
<td>(2,747,803)</td>
<td>2,092,147</td>
</tr>
<tr>
<td>Gain in undistributed earnings of subsidiary</td>
<td>(314,106)</td>
<td>(379,517)</td>
</tr>
<tr>
<td>Provision (credit) for losses on receivables</td>
<td>68,738</td>
<td>145,401</td>
</tr>
<tr>
<td>Change in interest rate swap valuation</td>
<td>84,087</td>
<td>(602,087)</td>
</tr>
<tr>
<td>Changes in</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dues receivable</td>
<td>(152,093)</td>
<td>209,244</td>
</tr>
<tr>
<td>Accounts and other receivables</td>
<td>683,853</td>
<td>(1,036,518)</td>
</tr>
<tr>
<td>Contributions receivable</td>
<td>7,750</td>
<td>16,000</td>
</tr>
<tr>
<td>Printed material for resale</td>
<td>(4,061)</td>
<td>1,146</td>
</tr>
<tr>
<td>Other assets</td>
<td>46,269</td>
<td>(229,497)</td>
</tr>
<tr>
<td>Dividend on deposit liability</td>
<td>(252,090)</td>
<td>3,999,582</td>
</tr>
<tr>
<td>Accounts payable</td>
<td>(351,937)</td>
<td>878,369</td>
</tr>
<tr>
<td>Accrued expenses</td>
<td>17,075</td>
<td>11,032</td>
</tr>
<tr>
<td>Deferred revenue</td>
<td>(184,097)</td>
<td>1,168,472</td>
</tr>
<tr>
<td>Operating lease liabilities</td>
<td>(29,423)</td>
<td>(36,580)</td>
</tr>
<tr>
<td>Net cash provided by (used in) operating activities</td>
<td>(3,447,736)</td>
<td>5,440,471</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>2023</th>
<th>2022</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Investing Activities</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Purchase of property and equipment</td>
<td>(206,383)</td>
<td>(120,473)</td>
</tr>
<tr>
<td>Proceeds from sale of equipment</td>
<td>-</td>
<td>140</td>
</tr>
<tr>
<td>Purchase of investments</td>
<td>(3,956,543)</td>
<td>(10,660,713)</td>
</tr>
<tr>
<td>Proceeds from disposition of investments</td>
<td>5,507,954</td>
<td>5,217,043</td>
</tr>
<tr>
<td>Net cash provided by (used in) investing activities</td>
<td>1,345,028</td>
<td>(5,564,003)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>2023</th>
<th>2022</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Financing Activities</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Payments on long-term debt</td>
<td>(533,333)</td>
<td>(533,333)</td>
</tr>
<tr>
<td>Borrowings on line of credit agreement</td>
<td>4,000,000</td>
<td>1,000,000</td>
</tr>
<tr>
<td>Payments on line of credit agreement</td>
<td>(1,000,000)</td>
<td>-</td>
</tr>
<tr>
<td>Net cash provided by financing activities</td>
<td>2,466,667</td>
<td>466,667</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>2023</th>
<th>2022</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Increase in Cash</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>363,959</td>
<td>343,135</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>2023</th>
<th>2022</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Cash, Beginning of Year</strong></td>
<td>1,189,641</td>
<td>846,506</td>
</tr>
<tr>
<td><strong>Cash, End of Year</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>$ 1,553,600</td>
<td>$ 1,189,641</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>2023</th>
<th>2022</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Supplemental Cash Flows Information</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Interest paid</td>
<td>$ 302,861</td>
<td>$ 227,651</td>
</tr>
<tr>
<td>Transfer of building from held-for-sale to operations</td>
<td>$ -</td>
<td>$ 1,511,837</td>
</tr>
</tbody>
</table>

---

*See Notes to Parent-Only Financial Statements*
Note 1. Nature of Operations and Summary of Significant Accounting Policies

Nature of Operations
American Optometric Association (the “Association” or “AOA”) is the national nonprofit professional association of optometrists. The Association’s primary source of revenue is membership dues. The Association extends unsecured credit to its customers on purchases of printed materials.

Basis of Presentation
In the parent-only financial statements, the equity of AOAExcel, Inc., the Association’s wholly-owned for-profit subsidiary, has been included in the statements of financial position as investment in subsidiary. The Association’s share of net income of its unconsolidated subsidiary is included in the statements of activities using the equity method. The net assets and operations of Optometry Cares – The AOA Foundation, Health Care Alliance for Patient Safety and American Optometric Association Political Action Committee, affiliated organizations, are not reported. These parent-only financial statements should be read in conjunction with the Association’s parent-only financial statements.

Use of Estimates
The preparation of financial statements in conformity with accounting principles generally accepted in the United States of America requires management 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 parent-only financial statements and the reported amounts of revenues and expenses during the reporting period. Actual results could differ from those estimates.

Cash
Uninvested cash and cash equivalents included in investment accounts and dividends on deposit are not considered to be cash and cash equivalents.

At December 31, 2023, the Association’s cash accounts exceeded federally insured limits by approximately $1,357,000.

Investments
The Association measures securities at fair value. The Association considers money market funds and all highly liquid debt instruments purchased with a maturity of three months or less held by the investment manager as part of the investment portfolio and not considered cash and cash equivalents.

Net Investment Return
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, less external and direct internal investment expenses. Gains and losses on the sale of securities are recorded on the trade date and are determined using the specific identification method.

Investment return that is initially restricted by donor stipulation and for which the restriction will be satisfied in the same year is included in net assets without donor restrictions. Other investment return is reflected in the statements of activities as revenue and expenses without donor restrictions.
During 2022, the Association sold its share of equity held in a company outside of its investment portfolio for an approximate $1,121,000 gain. The gain has been netted with investment return, net, on the 2022 statement of activities.

**Dues and Accounts Receivable**

Dues receivable are stated at the amount of consideration from members, of which the Association has an unconditional right to receive. The Association provides an allowance for credit losses, which is based upon a review of outstanding receivables, historical collection information and existing economic conditions adjusted for current conditions and reasonable and supportable forecasts.

Accounts receivable are stated at the amount of consideration from members or customers, of which the Association has an unconditional right to receive. Accounts receivable are ordinarily due 30 days after the issuance of the invoice. Accounts past due more than 120 days are considered delinquent. Delinquent receivables are written off based on the individual credit evaluation and specific circumstances of the customer.

**Printed Materials for Resale**

Costs for printed materials for sale are determined using the first-in, first-out (FIFO) method. FIFO inventories are stated at the lower of cost or net realizable value.

**Dividend on Deposit and Dividend on Deposit Liability**

The Association administers certain group life and long-term disability insurance policies as a service to its members which include a dividend on deposit. These dividends are owned by the Association; however, can only be paid out for the benefit of the customer related to the policies. As such a dividend on deposit and equal dividend on deposit liability are recorded for the balance of the policy.

**Property and Equipment**

Property and equipment are stated at cost less accumulated depreciation and are depreciated over the estimated useful life of each asset. Annual depreciation is computed using the straight-line method.

The estimated useful lives for each major depreciable classification of property and equipment are as follows:

- Building and improvements: 15-40 years
- Furniture and equipment: 3-10 years

**Long-Lived Asset Impairment**

The Association evaluates the recoverability of the carrying value of long-lived assets whenever events or circumstances indicate the carrying amount may not be recoverable. If a long-lived asset is tested for recoverability and the undiscounted estimated future cash flows expected to result from the use and eventual disposition of the asset are less than the carrying amount of the asset, the asset cost is adjusted to fair value and an impairment loss is recognized as the amount by which the carrying amount of a long-lived asset exceeds its fair value.

No asset impairment was recognized during the years ended December 31, 2023 and 2022.

**Debt Issuance Costs**

Debt issuance costs represent costs incurred in connection with the issuance of long-term debt. The Association records these costs as direct deductions from the related debt. Such costs are being amortized over the term of the respective debt using the effective interest method.
Net Assets

Net assets, revenues, gains and losses are classified based on the existence or absence of donor-imposed restrictions.

Net assets without donor restrictions are available for use in general operations and not subject to donor restrictions. The governing board has designated, from net assets without donor restrictions, net assets for an emergency fund, program working capital fund, scholarships, and memorials.

Net assets with donor restrictions are subject to donor-imposed restrictions. The restrictions are temporary in nature and will be met by the passage of time or other events specified by the donor.

Revenue Recognition

Revenue is recognized as the Association satisfies performance obligations under its contracts. Revenue is reported in an amount that reflects the consideration that it expects to be entitled to in exchange for those goods or services. The amount and timing of revenue recognition varies based on the nature of the goods or services provided and the terms and conditions of the member or customer contract. See Note 14 for additional information about the Association's revenue.

Contributions

Gifts of cash and other assets received without donor stipulations are reported as revenue and net assets without donor restrictions. Gifts received with a donor stipulation that limits their use are reported as revenue and net assets with donor restrictions. When a donor stipulated time restriction ends or purpose restriction is accomplished, net assets with donor restrictions are reclassified to net assets without donor restrictions and reported in the statement of activities as net assets released from restrictions. Gifts having donor stipulations which are satisfied in the period the gift is received are reported as revenue and net assets without donor restrictions.

Unconditional gifts expected to be collected within one year are reported at their net realizable value. Unconditional gifts expected to be collected in future years are initially reported at fair value determined using the discounted present value of estimated future cash flows technique. The resulting discount is amortized using the level-yield method and is reported as contribution revenue.

Conditional gifts depend on the occurrence of a specified future and uncertain event to bind the potential donor and are recognized as assets and revenue when the conditions are substantially met and the gift becomes unconditional.

Deferred Revenue

Revenues from industry funding, accreditation and Optometry's Meeting® exhibit fees are recognized in the period to which they relate. Fees and membership dues billed and collected in advance are recorded as deferred revenue and are recognized over the periods to which the fees and membership dues relate.

Investment in Subsidiary

Investment in subsidiary includes the equity interest in AOAExcel, Inc., the Association’s wholly-owned for-profit subsidiary. The Association has elected to report distributions received from AOAExcel within the statement of cash flows using the cumulative earnings approach.
Income Taxes
The Association is exempt from income taxes under Section 501 of the Internal Revenue Code and a similar provision of state law. However, the Association is subject to federal income tax on any unrelated business income.

The Association files tax returns in the U.S. federal jurisdiction.

Functional Allocation of Expenses
The costs of supporting the various programs and other activities have been summarized on a functional basis in the statements of activities. The statements of functional expenses present the natural classification detail of expenses by function. Certain costs have been allocated among the program, management and general and fundraising categories based on time spent and other methods.

Change in Accounting Principle
Effective January 1, 2023, the Association adopted ASU 2016-13, Financial Instrument – Credit Losses (Topic 326), Measurement of Credit Losses on Financial Instruments, related to the impairment of financial instruments. This guidance, commonly referred to as current expected credit loss (CECL), changes impairment recognition to a model that is based on expected losses rather than incurred losses. The measurement of expected credit losses under the CECL methodology is applicable to financial assets measured at amortized cost, including notes receivables and trade receivables.

Upon adoption of the guidance on January 1, 2023, the Association recognized no impact on net assets.

Note 2. Contributions Receivable
All contributions receivable are restricted for time or purpose. Contributions receivable consist of the following:

<table>
<thead>
<tr>
<th></th>
<th>2023</th>
<th>2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contributions receivable</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Due within one year</td>
<td>$</td>
<td>$ 17,500</td>
</tr>
<tr>
<td>Less allowance for uncollectible contributions</td>
<td>-</td>
<td>(9,750)</td>
</tr>
<tr>
<td></td>
<td>$</td>
<td>$ 7,750</td>
</tr>
</tbody>
</table>

Note 3. Revolving Line of Credit
The Association has a $4,000,000 unsecured revolving line of credit that expires in July 2024. At December 31, 2023 and 2022, $4,000,000 and $1,000,000, respectively, was borrowed on the line. Interest is payable monthly and varies based on the Bank’s Prime (“Index”) rate. At December 31, 2023 and 2022, the interest rate was 6.62% and 5.62%, respectively.
Note 4. Long-Term Debt

Note payable to bank due December 31, 2031; principal payable - $44,444 monthly in addition to interest at LIBOR plus 145 basis points, interest rate was 6.79% and 5.57% at December 31, 2023 and 2022, respectively, secured by first lien on building

<table>
<thead>
<tr>
<th></th>
<th>2023</th>
<th>2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less unamortized debt issuance costs</td>
<td>21,124</td>
<td>23,821</td>
</tr>
<tr>
<td>Less current maturities</td>
<td>533,333</td>
<td>533,333</td>
</tr>
<tr>
<td><strong>$</strong></td>
<td><strong>3,712,210</strong></td>
<td><strong>4,242,846</strong></td>
</tr>
</tbody>
</table>

Unamortized debt issuance cost will be amortized over the 15-year term of the note payable. The effective rates approximate the stated rates on the debt for the years ended December 31, 2023 and 2022.

Aggregate annual maturities of long-term debt payments at December 31, 2023, are:

<table>
<thead>
<tr>
<th>Year</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>2024</td>
<td>$533,333</td>
</tr>
<tr>
<td>2025</td>
<td>533,333</td>
</tr>
<tr>
<td>2026</td>
<td>533,333</td>
</tr>
<tr>
<td>2027</td>
<td>533,333</td>
</tr>
<tr>
<td>2028</td>
<td>533,333</td>
</tr>
<tr>
<td>Thereafter</td>
<td>1,600,002</td>
</tr>
<tr>
<td><strong>$</strong></td>
<td><strong>4,266,667</strong></td>
</tr>
</tbody>
</table>

Note 5. Interest Rate Swap

As a strategy to maintain acceptable levels of exposure to the risk of changes in future cash flows due to interest rate fluctuations, the Association entered into an interest rate swap agreement for its variable rate debt which was effective December 1, 2016. The agreement provides for the Association to receive interest from the counterparty at Index plus 1.45% and to pay interest to the counterparty at a fixed rate of 4.04% on current notional amounts of $4,266,667 and $4,800,000 at December 31, 2023 and 2022, respectively. Under the agreement, the Association pays or receives the net interest amount monthly, with the monthly settlements included in interest expense.
The table below presents certain information regarding the Association’s interest rate swap agreement.

<table>
<thead>
<tr>
<th></th>
<th>2023</th>
<th>2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fair value of the interest rate swap agreement</td>
<td>$161,347</td>
<td>$245,434</td>
</tr>
<tr>
<td>Statement of financial position location of fair value amount</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gain (loss) recognized in statement of activities</td>
<td>$110,938</td>
<td>$49,028</td>
</tr>
<tr>
<td>Location of gain (loss) recognized in statement of activities</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Net monthly settlements paid</td>
<td>$161,347</td>
<td>$245,434</td>
</tr>
<tr>
<td>Location of settlement expense in statement of activities</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Note 6. Leases – ASC 842**

**Accounting Policies**

The Association determines if an arrangement is a lease or contains a lease at inception. Leases result in the recognition of right-of-use (ROU) assets and lease liabilities on the balance sheets. ROU assets represent the right to use an underlying asset for the lease term, and lease liabilities represent the obligation to make lease payments arising from the lease, measured on a discounted basis. The Association determines lease classification as operating or finance at the lease commencement date.

The Association combines lease and nonlease components, such as common area and other maintenance costs, and accounts for them as a single lease component in calculating the ROU assets and lease liabilities for its office buildings.

At lease commencement, the lease liability is measured at the present value of the lease payments over the lease term. The ROU asset equals the lease liability adjusted for any initial direct costs, prepaid or deferred rent, and lease incentives. The Association has made a policy election to use a risk-free rate (the rate of a zero-coupon U.S. Treasury instrument) for the initial and subsequent measurement of all lease liabilities. The risk-free rate is determined using a period comparable with the lease term.

The lease term may include options to extend or terminate the lease that the Association is reasonably certain to exercise. Lease expense is generally recognized on a straight-line basis over the lease term.

The Association has elected not to record leases with an initial term of 12 months or less on the balance sheets. Lease expense on such leases is recognized on a straight-line basis over the lease term.

**Nature of Leases**

The Association has entered into the following lease arrangements.

**Operating Leases**

The Association leases office equipment through agreements that expire in various years through 2025. These leases generally require the Association to pay all executory costs (maintenance, and repairs). Termination of the leases is generally prohibited unless there is a violation under the lease agreement.
All Leases
The Association has no material related-party leases.

The Association’s lease agreements do not contain any material residual value guarantees or material restrictive covenants.

Quantitative Disclosures
The lease cost and other required information for the years ended December 31, 2023 and 2022 are:

<table>
<thead>
<tr>
<th></th>
<th>2023</th>
<th>2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>Operating lease cost</td>
<td>$30,132</td>
<td>$37,717</td>
</tr>
<tr>
<td>Cash paid for amounts included in the measurement of lease liabilities</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Operating cash flows from operating leases</td>
<td>$29,423</td>
<td>$36,580</td>
</tr>
<tr>
<td>Weighted-average remaining lease term in years for operating leases</td>
<td>2.18 years</td>
<td>2.89 years</td>
</tr>
<tr>
<td>Weighted-average discount rate for operating leases</td>
<td>1.26%</td>
<td>1.26%</td>
</tr>
</tbody>
</table>

Future minimum lease payments and reconciliation to the balance sheet at December 31, 2023, are as follows:

<table>
<thead>
<tr>
<th>Operating Leases</th>
<th>2023</th>
<th>2024</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2024</td>
<td>$21,490</td>
<td></td>
</tr>
<tr>
<td>2025</td>
<td>19,874</td>
<td></td>
</tr>
<tr>
<td>2026</td>
<td>4,969</td>
<td></td>
</tr>
<tr>
<td>Total future undiscounted cash flows</td>
<td>46,333</td>
<td></td>
</tr>
<tr>
<td>Less: imputed interest</td>
<td>(560)</td>
<td></td>
</tr>
<tr>
<td>Lease liabilities</td>
<td>$45,773</td>
<td></td>
</tr>
</tbody>
</table>
Note 7. Net Assets

Net Assets Without Donor Restrictions

Net assets without donor restrictions at December 31 consist of:

<table>
<thead>
<tr>
<th></th>
<th>2023</th>
<th>2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>Undesignated</td>
<td>$28,148,457</td>
<td>$28,008,199</td>
</tr>
<tr>
<td>Internally designated for</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Emergency funds</td>
<td>183,691</td>
<td>183,691</td>
</tr>
<tr>
<td>Program working capital funds</td>
<td>(5,944,971)</td>
<td>(4,751,295)</td>
</tr>
<tr>
<td></td>
<td>(5,761,280)</td>
<td>(4,567,604)</td>
</tr>
<tr>
<td></td>
<td>$22,387,177</td>
<td>$23,440,595</td>
</tr>
</tbody>
</table>

Note 8. Unconsolidated Entities

The Association has agreements with the American Board of Optometry (“the Company”) and American Optometric Student Association (“AOSA”) in which the Association provides certain staffing, support and facilities for the Company and AOSA. The Association, Company, and AOSA are not financially interrelated organizations.

The Association’s accounts receivable include amounts due from the Company of $4,181 and $3,720 for the years ended December 31, 2023 and 2022, respectively. The Association’s accounts receivable from AOSA were $33,365 and $20,356 for the years ended December 31, 2023 and 2022, respectively.

Note 9. Defined Contribution Plan

The Association has a 401(k) contributory pension plan to which the Association contributes an amount up to 5.5% of eligible (as to age and length of service) employees’ annual compensation, as defined. Expense under this plan was approximately $422,478 and $401,000 for the years ended December 31, 2023 and 2022, respectively.

Note 10. Fair Value Measurements and Disclosures

Fair value is the price that would be received to sell an asset or paid to transfer a liability in an orderly transaction between market participants at the measurement date. Fair value measurements must maximize the use of observable inputs and minimize the use of unobservable inputs. There is a hierarchy of three levels of inputs that may be used to measure fair value:

- **Level 1** Quoted prices in active markets for identical assets or liabilities
- **Level 2** Observable inputs other than Level 1 prices, such as quoted prices for similar assets or liabilities; quoted prices in markets that are not active; or other inputs that are observable or can be corroborated by observable market data for substantially the full term of the assets or liabilities
**Level 3** Unobservable inputs supported by little or no market activity and are significant to the fair value of the assets or liabilities

**Recurring Measurements**

The following table presents the fair value measurements of assets and liabilities recognized in the accompanying statements of financial position measured at fair value on a recurring basis and the level within the fair value hierarchy in which the fair value measurements fall at December 31, 2023 and 2022:

<table>
<thead>
<tr>
<th></th>
<th>Quoted Prices in Active Markets for Identical Assets (Level 1)</th>
<th>Significant Other Observable Inputs (Level 2)</th>
<th>Significant Unobservable Inputs (Level 3)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>December 31, 2023</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Assets</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Investments</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Common stocks, diverse industry sectors</td>
<td>$ 7,583,140</td>
<td>$ 7,583,140</td>
<td>$</td>
</tr>
<tr>
<td>Money market funds</td>
<td>$ 286,536</td>
<td>$ 286,536</td>
<td>$</td>
</tr>
<tr>
<td>Corporate bonds, primarily financial sector</td>
<td>$ 1,310,742</td>
<td>$</td>
<td>$ 1,310,742</td>
</tr>
<tr>
<td>Government bonds</td>
<td>$ 5,805,349</td>
<td>$</td>
<td>$ 5,805,349</td>
</tr>
<tr>
<td>Certificates of deposit</td>
<td>$ 330,424</td>
<td>$</td>
<td>$ 330,424</td>
</tr>
<tr>
<td>Mutual funds, diverse types of funds</td>
<td>$ 8,838,430</td>
<td>$ 8,838,430</td>
<td>$</td>
</tr>
<tr>
<td><strong>Total investments</strong></td>
<td>$ 24,154,621</td>
<td>$ 16,708,106</td>
<td>$ 7,446,515</td>
</tr>
<tr>
<td>Interest rate swap agreement</td>
<td>$ 161,347</td>
<td>$</td>
<td>$ 161,347</td>
</tr>
</tbody>
</table>

| **December 31, 2022**|                                                               |                                                 |                                        |
| **Assets**           |                                                               |                                                 |                                        |
| Investments          |                                                               |                                                 |                                        |
| Common stocks, diverse industry sectors | $ 7,696,622 | $ 7,696,622 | $ | $ | $ |
| Money market funds   | $ 204,956 | $ 204,956 | $ | $ | $ |
| Corporate bonds, primarily financial sector | $ 1,581,802 | $ | $ 1,581,802 | | $ |
| Government bonds     | $ 5,051,950 | $ | $ 5,051,950 | | $ |
| U.S. Treasury bills  | $ 293,835 | $ | $ 293,835 | | $ |
| Certificates of deposit | $ 568,559 | $ | $ 568,559 | | $ |
| Mutual funds, diverse types of funds | $ 7,560,505 | $ 7,560,505 | $ | $ | $ |
| **Total investments** | $ 22,958,229 | $ 15,462,083 | $ 7,496,146 | | $ |
| Interest rate swap agreement | $ 245,434 | $ | $ 245,434 | | $ |

Following is a description of the valuation methodologies and inputs used for assets and liabilities measured at fair value on a recurring basis and recognized in the accompanying statements of financial position, as well as the general classification of such assets and liabilities pursuant to the valuation hierarchy. There have been no significant changes in valuation techniques during the year ended December 31, 2023.

**Investments**

Where quoted market prices are available in an active market, investments are classified within Level 1 of the valuation hierarchy. If quoted market prices are not available, then fair values are estimated by using pricing models, quoted prices of securities with similar characteristics, the inputs of which are market-based or independently sourced market parameters, including but not limited to, yield curves, interest rates, volatilities,
prepayments, defaults, cumulative loss projections and cash flows. Such investments are classified in Level 2 of the valuation hierarchy. In certain cases where Level 1 or Level 2 inputs are not available, investments are classified within Level 3 of the hierarchy.

**Interest Rate Swap Agreement**

The fair value is estimated using forward-looking interest rate curves and discounted cash flows that are observable or can be corroborated by observable market data and, therefore, are classified within Level 2 of the valuation hierarchy.

**Note 11. Significant Estimates and Concentrations**

Accounting principles generally accepted in the United States of America require disclosure of certain significant estimates and vulnerabilities due to certain concentrations. Those matters include the following:

**Investments**

The Association invests in various investment securities. Investment securities are exposed to various risks such as interest rate, market and credit risks. Due to the level of risk associated with certain investment securities, it is at least reasonably possible that changes in the values of investment securities will occur in the near term and that such change could materially affect the amounts reported in the accompanying statements of financial position.

**Allowance for Credit Losses**

Estimates of the allowance for credit losses are described in Note 1.

**Note 12. Commitments**

The Association has committed to future locations where conferences will be held for various years through 2029. As such, the Association has entered into agreements with hotels and convention centers at each future location which have cancellation penalties. No cancellation penalties were incurred during 2023 and 2022. No liability was recorded or known as of December 31, 2023 and 2022. Should the Association cancel for a reason not allowed under any existing contracts, the approximate maximum penalties associated with commitments through 2029 are approximately $7,250,000 as of December 31, 2023.
Note 13. Liquidity and Availability

Financial assets available for general expenditure, that is, without donor or other restrictions limiting their use, within one year of December 31, 2023 and 2022, are cash and investment balances of $25,708,221 and $24,147,870, respectively.

The Association manages its liquidity and reserves following three guiding principles: operating within a prudent range of financial soundness and stability, maintaining adequate liquid assets to fund near-term operating needs and maintaining sufficient reserves to provide reasonable assurance that long-term obligations will be discharged.

Note 14. Revenue from Contracts with Members and Customers

Membership Dues

Revenue from contracts with members for annual dues is reported at the amount that reflects the consideration to which the Association expects to be entitled in exchange for providing membership benefits. These amounts are due from members and others and do not include variable consideration.

Revenue is recognized as performance obligations are satisfied, which is ratabily over the membership term using the input method. Generally, the Association bills members annually with payment due quarterly.

Industry Support, Registration Income and Exhibit Booths and Meetings

Revenue from contracts with customers for industry support, registration income and exhibit booths and meetings is reported at the amount that reflects the consideration to which the Association expects to be entitled in exchange for providing goods or services to the customer. These amounts are due from customers and do not include variable consideration.

Revenue is recognized as performance obligations are satisfied, which is at a point in time. Generally, for industry support, registration income and exhibit booths and meetings, the point in time coincides with an event at which time the goods or services are provided to the customer.

Accreditation Council on Optometric Education Site Visits and Fees

Revenue from contracts with professionals for Accreditation Council on Optometric Education (“ACOE”) site visits and fees are reported at the amount that reflects the consideration to which the Association expects to be entitled in exchange for providing services to the professional. These amounts are due from professionals and do not include variable consideration.

The performance obligations include application processing, site visits and providing annual accreditation status. Revenue is recognized as performance obligations are satisfied, which is at a point in time.

Sale of Printed Materials

Revenue from the sale of printed materials is measured as the amount of consideration the Association expects to receive in exchange for transferring the materials to customers. The revenue is reported net of sales discounts offered to customers. The Association recognizes revenue when performance obligations under the terms of contracts with its customers are satisfied, which occurs when control passes to a customer to enable them to direct the use of and obtain benefit from a product which is when the product is shipped.
Advertising Revenue

Revenue from contracts with customers for advertising revenue is reported at the amount that reflects the consideration to which the Association expects to be entitled in exchange for advertising. These amounts are due from customer and may include explicit variable consideration based on the amount of advertising space purchased.

Revenue is recognized as performance obligations are satisfied, which is at a point in time and typically at the time the related media is published.

Other Contract Revenue

Performance obligations are determined based on the nature of the goods or services provided by the Association in accordance with the contract. Revenue for performance obligations satisfied over time is recognized ratably over the period based on time elapsed. The Association believes this method provides a faithful depiction of the transfer of services over the term of the performance obligation based on the inputs needed to satisfy the obligation.

Revenue for performance obligations satisfied at a point in time is generally recognized when goods or services are provided to customers at a single point in time and the Association does not believe it is required to provide additional goods or services related to that sale.

Transaction Price and Recognition

The Association determines the transaction price based on standard charges for goods and services provided, reduced by discounts provided in accordance with the Association’s policy and implicit price concessions provided to customers. The Association determines its estimates of explicit price concessions based on its discount policies. The Association determines its estimate of implicit price concessions based on its historical collection experience with this class of customers. The Association’s revenue streams do not have significant financing components or contract costs.

The Association has determined that the nature, amount, timing and uncertainty of revenue and cash flows are affected by Association’s line of business that provided the service and by customer demand.

For the years ended December 31, 2023 and 2022, the Association recognized revenue of $18,571,174 and $18,891,942, respectively, and from goods and services that transfer to the member or customer over time and $7,502,198 and $7,212,445, respectively, from goods and services that transfer to the member or customer at a point in time.

Contract Balances

The following table provides information about the Association’s net receivables and deferred revenue from contracts with customers:

<table>
<thead>
<tr>
<th></th>
<th>2023</th>
<th>2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dues, accounts and other receivables, net, beginning of year</td>
<td>$ 3,499,316</td>
<td>$ 2,726,857</td>
</tr>
<tr>
<td>Dues, accounts and other receivables, net, end of year</td>
<td>$ 2,912,188</td>
<td>$ 3,499,316</td>
</tr>
<tr>
<td>Deferred revenue, beginning of year</td>
<td>$ 1,994,647</td>
<td>$ 826,175</td>
</tr>
<tr>
<td>Deferred revenue, end of year</td>
<td>$ 1,810,550</td>
<td>$ 1,994,647</td>
</tr>
</tbody>
</table>
Note 15. Transactions With Affiliated Organization

The Association has an agreement with Optometry Cares – The AOA Foundation ("Foundation"), whereby the Foundation pays a management fee of $10,000 per month to the Association for providing various administrative, technology, and occupancy services to the Foundation. Management fee income is included in other income on the parent-only statements of activities and totaled $120,000 in 2023 and 2022. At December 31, 2023 and 2022, the Association had receivables from the Foundation for $27,358 and $49,910, respectively, which is included in other receivables on the parent-only statements of financial position. The Association makes monthly contributions to the Foundation in support of its missions. During 2023 and 2022, the Association paid $200,000 in contributions to the Foundation. In addition, the Association has $19,989 and $29,549 included in accounts payable on the parent-only statements of financial position as of December 31, 2023 and 2022, respectively, for a pledge commitment to a Foundation fundraising campaign.

The Association has an agreement with Health Care Alliance for Patient Safety ("HCAPS") whereby HCAPS pays a management fee of $2,500 per month to the Association for providing administrative services. This fee income is included in other income on the parent-only statements of activities and totaled $30,000 for 2023 and 2022. At December 31, 2023 and 2022, the Association had receivables from HCAPS for $17,337 and $17,622, respectively, which is included in other receivables on the parent-only statements of financial position.

At December 31, 2023 and 2022, the Association received sponsorship and advertisement related income from AOAExcel and HCAPS for $350,000 and $368,600, respectively.

Note 16. Transactions With Wholly-Owned For-Profit Subsidiary

The Association has an agreement with AOAExcel, Inc. ("Excel"), whereby the Excel pays a management fee of $10,000 per month to the Association for providing various administrative, technology, and occupancy services to Excel. Management fee income is included in other income on the parent-only statements of activities totaled $120,000 in 2023 and 2022. At December 31, 2023 and 2022, the Association had receivables from Excel for $10,542 and $210,542, respectively, which is included in other receivables on the parent-only statements of financial position.

In addition, the Association has guaranteed a revolving $1,000,000 line of credit for Excel which matures in July 2024. The line is collateralized by the Association’s assets. At December 31, 2023 and 2022, no amount was borrowed on the line. The Association may seek reimbursement from Excel of any amounts expended under the guarantee.
As described in Note 1, the Association’s investment in Excel has been included within these financial statements as investment in subsidiary. The financial position and results of operations of Excel are summarized below:

<table>
<thead>
<tr>
<th></th>
<th>2023</th>
<th>2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current assets</td>
<td>$860,339</td>
<td>$929,374</td>
</tr>
<tr>
<td>Long-term assets</td>
<td>250,000</td>
<td>-</td>
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<tr>
<td>Total assets</td>
<td>$1,110,339</td>
<td>$929,374</td>
</tr>
<tr>
<td>Current liabilities</td>
<td>$159,736</td>
<td>$292,877</td>
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<tr>
<td>Long-term liabilities</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Equity</td>
<td>950,603</td>
<td>636,497</td>
</tr>
<tr>
<td>Total liabilities and equity</td>
<td>$1,110,339</td>
<td>$929,374</td>
</tr>
<tr>
<td>Total revenues</td>
<td>$1,628,581</td>
<td>$1,590,939</td>
</tr>
<tr>
<td>Total expenses</td>
<td>$1,314,475</td>
<td>$1,211,422</td>
</tr>
<tr>
<td>Total change in equity</td>
<td>$314,106</td>
<td>$379,517</td>
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</table>

**Note 17. Subsequent Events**

Subsequent events have been evaluated through June 7, 2024, which is the date the parent-only financial statements were available to be issued.
AOA REPORTS
AMERICAN OPTOMETRIC ASSOCIATION

DECEASED MEMBERS

MAY 1, 2023 – APRIL 30, 2024
And Other Members Not Previously Reported

HOUSE OF DELEGATES – 127th ANNUAL AOA CONGRESS &
OPTOMETRY’S MEETING
JUNE 2024
Nashville, TN

As reported by the Affiliated Associations
### ALABAMA

<table>
<thead>
<tr>
<th>Name</th>
<th>City</th>
</tr>
</thead>
<tbody>
<tr>
<td>Charles Nelson, O.D.</td>
<td>Talledega, AL</td>
</tr>
<tr>
<td>Robert T. Gmelin, O.D.</td>
<td>Sonoma, CA</td>
</tr>
<tr>
<td>Ellis M. Madsen, O.D.</td>
<td>Louisville, KY</td>
</tr>
<tr>
<td>Robert Mendoza Poquis, O.D.</td>
<td>The Villages, FL</td>
</tr>
<tr>
<td>Charles A. Rhoads, O.D.</td>
<td>Ft Walton Bch, FL</td>
</tr>
<tr>
<td>Albert J. Schwartz, O.D.</td>
<td>Kearneysville, WV</td>
</tr>
<tr>
<td>Luther D. Solverson, O.D.</td>
<td>Martinez, GA</td>
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</table>

### ARMED FORCES OPTOMETRIC SOCIETY

<table>
<thead>
<tr>
<th>Name</th>
<th>City</th>
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<tbody>
<tr>
<td>Ted R. Foster, O.D.</td>
<td>Santa Cruz, CA</td>
</tr>
<tr>
<td>Louis A. Galasso, O.D.</td>
<td>Los Angeles, CA</td>
</tr>
<tr>
<td>Howard D. Garber, O.D.</td>
<td>Anaheim, CA</td>
</tr>
<tr>
<td>Waldo Jackson, O.D.</td>
<td>San Marino, CA</td>
</tr>
<tr>
<td>Ton F. Jue, O.D.</td>
<td>Aptos, CA</td>
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<tr>
<td>Melvin B. Kranseler, O.D.</td>
<td>Palm Desert, CA</td>
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<tr>
<td>Adolphus W. Lages, O.D.</td>
<td>Glendale, CA</td>
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<td>Larkspur, CA</td>
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<tr>
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<tr>
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<tr>
<td>Paul J. Meltzner, O.D.</td>
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<tr>
<td>James B. Monical, O.D.</td>
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<tr>
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<tr>
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<tr>
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<tr>
<td>Akira Tajiri, O.D.</td>
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<td>John T. Volponi, O.D.</td>
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### CALIFORNIA

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### CONNECTICUT

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<tr>
<td>James A. Ciccarelli, O.D.</td>
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<tr>
<td>State</td>
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<td>Florida</td>
<td>Shannon D. Fowler, O.D.</td>
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<td>J. Robert Mitchem, O.D.</td>
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<td>Karen L. Weber-Mullican, O.D.</td>
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<td>Hawaii</td>
<td>Edward D. Flynn, Jr., O.D.</td>
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<td>Earle H. Nakagawa, O.D.</td>
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<td>Janel Sato, O.D.</td>
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<td>Stanley K. Tanaka, O.D.</td>
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<td>Illinois</td>
<td>Albert A. Bucar, O.D.</td>
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<td>Donald R. Gordon, O.D.</td>
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<td>Scott W. Lewis, O.D.</td>
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<td>Benjamin T. Rose, O.D.</td>
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<td>Darrell G. Schlange, O.D.</td>
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<td>Indiana</td>
<td>Carl Plasterer, O.D.</td>
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<td>James E. Reeves, O.D.</td>
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<td>James A. Seal, O.D.</td>
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</tbody>
</table>
IOWA

Larry D. DeCook, O.D.  
Robert C. Pearson, O.D.  
Larry H. Pipkin, O.D.  
Craig S. Rock, O.D.  
Bradley Weyers, O.D.  
Newton, IA

Robert C. Pearson, O.D.  
Larry H. Pipkin, O.D.  
Craig S. Rock, O.D.  
Bradley Weyers, O.D.  
North Liberty, IA

Craig S. Rock, O.D.  
Bradley Weyers, O.D.  
Burlington, IA

KANSAS

Jerold E. Akers, O.D.  
William S. Benkelman, O.D.  
Rex W Gibson, O.D.  
John P. Harvat, O.D.  
Franklin D. Reinhardt, O.D.  
Wakeeney, KS

William S. Benkelman, O.D.  
Rex W Gibson, O.D.  
John P. Harvat, O.D.  
Franklin D. Reinhardt, O.D.  
Lawrence, KS

KENTUCKY

John W. Cecconi, Sr., O.D.  
Henry R. Pardon, O.D.  
George Paul Rooney, O.D.  
Springfield, KY

Henry R. Pardon, O.D.  
George Paul Rooney, O.D.  
Owensboro, KY

George Paul Rooney, O.D.  
Glasgow, KY

MAINE

Richard D. Houghton, O.D.  

MAINE

MARYLAND

Paul H. Heavner, O.D.  
Forrest Z. Miles, O.D.  
Hagerstown, MD

Forrest Z. Miles, O.D.  
Plymouth, MA

Hagerstown, MD

MASSACHUSETTS

Harry G. Churchill, Jr., O.D.  
Richard J. Glugeth, O.D.  
Ernest J. Kahn, O.D.  
John H. Mackenzie, O.D.  
Indra Mohindra, O.D.  
Holly P. Schneider, O.D.  
Walter P. Taranto, O.D.  
Plymouth, MA

Richard J. Glugeth, O.D.  
Ernest J. Kahn, O.D.  
John H. Mackenzie, O.D.  
Indra Mohindra, O.D.  
Holly P. Schneider, O.D.  
Walter P. Taranto, O.D.  
Cambridge, MA

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John H. Mackenzie, O.D.  
Indra Mohindra, O.D.  
Holly P. Schneider, O.D.  
Walter P. Taranto, O.D.  
Natick, MA

John H. Mackenzie, O.D.  
Indra Mohindra, O.D.  
Jamaica Plain, MA

Indra Mohindra, O.D.  
Jamaica Plain, MA

Holly P. Schneider, O.D.  
Waban, MA

Walter P. Taranto, O.D.  
Arlington, MA
Michigan

Harland L. Beers, O.D. Bonita Spsgs, FL
Paul K. Douglas, O.D. Saginaw, MI
Ned B. Grover, O.D. Goodyear, AZ
James M. Pascavis, O.D. Muskegon, MI
William G. Pope, O.D. West Bloomfield, MI
Phillip Raznik, O.D.
Randy G. Watsky, O.D.

Minnesota

K. W. Blake, O.D. Edina, MN
Norman R. Hellerud, O.D. Bemidji, MN
Leroy W. Hill, O.D. Sartell, MN
Ronald W. Kost, O.D. Burnsville, MN
Clark G. Ohnesorge, O.D. Northfield, MN
Alan R. Paymar, O.D.
Duane J. Wallaker, O.D.

Mississippi

Dewey A. Handy, O.D. Jackson, MS

Missouri

Glade F. Whitworth, O.D. Independence, MO

Nebraska

Ronald L. Conrad, O.D. Lincoln, NE
Charles A. Gray, O.D. Seward, NE
Kenneth E. Paulsen, O.D.

New Jersey

Kenneth R. Blair, O.D. Leland, NC
William F. Beegle, O.D. Eatontown, NJ
Bernard Feldman, O.D. Montvale, NJ
Howard Frankel, O.D. Atlantic City, NJ
Albert Goldstein, O.D. Boca Raton, FL

(continued)
NEW JERSEY (contd.)

Donald A. Petrie, O.D. Hendersonville, NC
Eugene R. Tendler, O.D.
Joseph A. Viviano, O.D. Longmeadow, MA
John R. Voorhis, III, O.D. Hobe Sound, L

NEW MEXICO

Elwyn E. Crume, O.D. Clovis, NM
Robert L. Jarrell, Jr., O.D. Albuquerque, NM
Martin L. Johnson, O.D. Farmington, NM
Oscar H. Marquardt, O.D. Alamogordo, NM
Orville F. Smith, O.D. Deming, NM

NEW YORK

Norman A. Emerson, O.D. Greenville, SC
Robert A. Goodman, O.D. Scottsdale, AZ
Stuart Yorkshire, O.D. Rexford, NY

OHIO

Ronald M. Beal, O.D. Sidney, OH
John O. Beigel, O.D. Heath, OH
Thomas A. Brannon, O.D. Springboro, OH
Allen G. Dubro, O.D. Miamisburg, OH
E. Thomas Flinn, O.D. Columbus, OH
Richard M. Hill, O.D. Hudson, OH
Phillip B. Keller, O.D. Columbus, OH
Irwin Pass, O.D. Millersburg, OH
Roy A. Schlabach, O.D. Poland, OH
S. Timothy Shafer, O.D. Dayton, OH
David B. Stebelton, O.D.
Park A. Studebaker, O.D.

OKLAHOMA

Gayle V. Farmer, O.D. Duncan, OK
Ronny M. LaQuey, O.D.
Harold L. Meister, O.D. Owasso, OK
<table>
<thead>
<tr>
<th>OREGON</th>
</tr>
</thead>
<tbody>
<tr>
<td>Thomas T. Bourgeois, O.D.</td>
</tr>
<tr>
<td>Samantha Caggiano, O.D.</td>
</tr>
<tr>
<td>Michel A. Gaynor, O.D.</td>
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<tr>
<td>Portland, OR</td>
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<tr>
<td>Keizer, OR</td>
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</table>

<table>
<thead>
<tr>
<th>PENNSYLVANIA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pamela M. Assalita, O.D.</td>
</tr>
<tr>
<td>Leslie D. Budinger, O.D.</td>
</tr>
<tr>
<td>Victor C. Cherico, O.D.</td>
</tr>
<tr>
<td>Bruce M. May, O.D.</td>
</tr>
<tr>
<td>Edward J. Szymala, O.D.</td>
</tr>
<tr>
<td>James A. Tribbett, O.D.</td>
</tr>
<tr>
<td>State College, PA</td>
</tr>
<tr>
<td>Cape May, NJ</td>
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<tr>
<td>Clarion, PA</td>
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<td>Reading, PA</td>
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<tr>
<td>Royersford, PA</td>
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<td>Boyertown, PA</td>
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</table>

<table>
<thead>
<tr>
<th>RHODE ISLAND</th>
</tr>
</thead>
<tbody>
<tr>
<td>Allen L. Klibanoff, O.D.</td>
</tr>
<tr>
<td>Providence, RI</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>SOUTH CAROLINA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Norden W. Davis, Sr., O.D.</td>
</tr>
<tr>
<td>William H. Davis, Jr., O.D.</td>
</tr>
<tr>
<td>Gaffney, SC</td>
</tr>
<tr>
<td>Chapin, SC</td>
</tr>
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</table>

<table>
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<tr>
<th>SOUTH DAKOTA</th>
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<tbody>
<tr>
<td>Brad J. Moriarty, O.D.</td>
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<tr>
<td>Stuart N. Quam, O.D.</td>
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<td>James E. Trimble, O.D.</td>
</tr>
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<td>Daniel A. Watson, O.D.</td>
</tr>
<tr>
<td>Rapid City, SD</td>
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<tr>
<td>Aberdeen, SD</td>
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<td>Sturgis, SD</td>
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Theron A. Baber, O.D. Wichita Falls, TX
Bobby D. Cope, O.D. Waxahachie, TX
David R. Frazee, O.D. Frisco, TX
Tom W. Krohn, O.D.
Herbert H. Moore, O.D.
Donald F. Semler, O.D.
Jerald W. Strickland, O.D. San Antonio, TX
Kent B. Wise, O.D. Houston, TX
Cleburne, TX

UTAH

William G. Schmutz, O.D. Bountiful, UT

VERMONT

John J. Tomasi, Jr., O.D. Rutland, VT

WEST VIRGINIA

Arabel E. Hatfield, O.D. Logan, WV
Craig A. Liebig, O.D.

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Paul K. Ellefson, O.D. Kenosha, WI
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Harry Douglas E. Inns, O.D. Brantford, CAN
E. John Wylie, O.D. Scarborough, CAN
AOAExcel provides personal and professional resources that allow doctors of optometry to practice and flourish with confidence. The products and services offered by AOAExcel’s endorsed business partners have been carefully vetted by AOAExcel staff members and a board of AOA member optometrists to meet the unique needs of AOA members nationwide. By taking advantage of the products and services offered by AOAExcel’s endorsed partners, AOA members can spend less time researching business resources and focus more energy on providing quality patient care.

**AOAExcel Board of Directors**

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Bob Kehm, Managing Director, AOAExcel  
Holly Murray, Marketing & Business Development Manager, AOAExcel  
Mike Stokes, J.D., General Counsel, AOA/AOAExcel

**Products and Services**

**Professional Protection**

- Malpractice Insurance, Business Owners Insurance, Cyber Liability Insurance, Employment Practices Liability Insurance—Affinity offers guaranteed full-scope malpractice insurance coverage to AOA members. As a member benefit, Lockton Affinity conducts complimentary policy reviews for AOA members to ensure they have adequate coverage under their current malpractice, business owners, cyber liability and employment practices liability insurance policies. Lockton Affinity also offers malpractice insurance discounts up to 50% for recent graduates who are in their first or second year of practice.

- Disability Insurance and Life Insurance—A.G.I.A., Inc. offers group life and disability insurance policies, including group long-term disability insurance with an own occupation benefit, which covers AOA members if they are unable to continue practicing as doctors of optometry due to a covered illness or injury.
Financial Health

- **AOA Business Card**—Mercantile Financial Technologies, Inc. offers a business credit card which is designed specifically for doctors of optometry to help manage their business (es). The credit card has multiple features, including high rewards, no annual fee and Mercantile-only vendor deals.

- **Student Loan Guidance**—Laurel Road provides doctors of optometry with the tools to understand their student loan repayment options. AOA members can receive a complimentary one-on-one consultation with a GradFin financial expert to explore all of their available repayment strategies and create a plan that best suits their needs. If refinancing is the right option, Laurel Road provides a 0.25% rate discount to AOA members in good standing through a no-cost online application.

- **Retirement Savings Planning**—Equitable Financial Life Insurance Company (Equitable Financial) offers a variety of retirement savings to help best suit the needs of AOA members. Equitable can evaluate the retirement plans members provide employees or assist in starting one today. The retirement plan specialists can check for high fees, lack of education, low participation and other common problems that could hamper a practice’s retirement plan offerings.

Profitability Maximization

- **Vendor Discounts**—AOA members have the opportunity to join the AOAEexcel Group Purchasing Organization (GPO) through Provista to access discounts on practice needs. Vendors offering discounts to AOA members through the AOAEexcel GPO include, but are not limited to, Office Depot, Medline and Pitney Bowes. There is no registration fee or required minimum spend to participate in the AOAEexcel GPO.

- **Credit Card Processing**—Chase offers AOA members a simple and secure payment processing solution that accommodates payments from all major debit and credit cards. AOA members are eligible for specialized pricing to help save on processing cost. As a member benefit, Chase offers AOA members complimentary contract reviews to help ensure members are getting the best deal on their payment processing solutions.

Career Growth and Transitions

- **Career Center**—The AOAEexcel Career Center serves as the only career center affiliated with the AOA and is exclusive to doctors of optometry. Job seeker accounts are free and easy to set up. AOA members who are employers seeking to fill a position are eligible for posting discounts up to 50% and receive access to a job seeker database with each active posting.

- **Practice Financing**—Bank of America offers AOA members practice financing solutions to assist with practice start up, new equipment purchases or other business needs. Bank of America
offers competitive terms and payment structures, and AOA members have access to a dedicated project member and rate lock program.

- Practice Transitions – Williams Group provides programs and consulting services to AOA members, ranging from transition advisory solutions, associateships, partnerships, valuations and appraisals. Williams Group is able to provide guidance to AOA members as they transition through changes in their practices.

State Affiliate Revenue Share Program

Through the State Affiliate Revenue Share Program, AOAExcel provides marketing materials promoting the services of Affinity (malpractice insurance), Laurel Road (student loan refinancing), Mercantile (AOA Business Card), and the AOAExcel Career Center to participating state affiliates. Participating state affiliates then distribute the marketing materials to their members through social media posts, emails, print catalogues, etc., and return examples of all published content to AOAExcel. AOAExcel then provides eligible participating state affiliates with a predetermined percentage of the net revenue received by AOAExcel in the form of commissions and incentive payments.

Participation in the State Affiliate Revenue Share Program is voluntary, and enrollment is rolling. If you are interested in participating in the State Affiliate Revenue Share Program, please contact AOAExcel at AOAExcel@AOA.org.
The American Optometry Student Association (AOSA) is committed to empowering students to thrive as doctors of optometry by promoting the optometric profession, enhancing the education and welfare of optometry students, as well as enhancing the vision and ocular health of the public. The AOSA represents nearly 7,100 students attending the 26 schools and colleges of optometry throughout the U.S., Canada and Puerto Rico. Each school is represented on the AOSA Board by a Trustee and Trustee-Elect. These individuals are prominent leaders within their schools and have a deep passion for optometry. All our programs are designed to meet our mission and vision and align within AOSA’s pillars: Education, Advocacy, Student Experience and Tools for Success.

Advocacy

Nearly 150 advocacy-minded students from across the country participated in AOA on Capitol Hill in April 2024 with affiliate leadership to directly connect with national policy leaders. More students than ever continue to engage in advocacy efforts through schools and colleges and with affiliate leadership. AOSA has further developed local Legucate Me programs at schools and colleges for student leaders to present, helping to educate their peers on top priorities in optometry from the moment they first enter optometry school.

AOSA continues to mobilize students in support of and being a voice for fighting legislative battles at the state and national level to ensure future doctors of optometry can practice to their fullest scope.

Student Experience

**AOSA National Welcome Night**

The AOSA hosted the third annual National Welcome Night for students in October 2023 with more than 1,000 optometry students joining to participate from every school and college across the U.S., Canada and Puerto Rico. Students took part in an hour-long session learning and understanding more about the AOSA, AOA and their state affiliates.

The next AOSA National Welcome Night is planned for October 2024.

Membership

The AOSA is making a concerted effort to connect students with their state associations upon entry into optometry school. The first AOSA Student-Affiliate Connection program was launched in the fall of 2022 providing students the opportunity to network with affiliate leaders from across the country, build doctor-student relationships and inquire about career opportunities and advocacy efforts in those particular states. With the overwhelmingly positive response from both students and doctors, the AOSA has continued this virtual program, with plans underway for Fall 2024.

**AOA+ 2023**

With the generous AOA+ grants provided by the AOA, more than 2,000 students gathered in Washington, D.C., for an historic combined Optometry’s Meeting® and AOA on Capitol Hill experience. AOA+ programming for students included more than 40 AOA+ recommended courses, hands-on workshops, networking opportunities, residency summit and career fair, as well as an Advocacy
Workshop to ensure every student was able to take home tools and resources to put into action in their local communities and become an advocate for optometry.

Tools for Success
The AOSA, in partnership with the AOA, has relaunched OptometryStudents.com (OS). OS is a website delivering content and resources to optometry students for more than a decade but has been revamped, rebranded and is ready to serve students better than ever. We have enhanced this online platform by offering a diverse range of resources including informative articles, how-to guides and reference materials. Whether someone is exploring optometry as a profession or is a student getting ready to take boards, OS is an online platform with a variety of content for any stage of a student’s career. OS is being charged by the power of community and is fueled by student contributors and content creators. Articles are regularly submitted by students for review and publication, highlighting their personal experiences in the field and answering questions encountered on their own personal journeys to share with the next round of optometric professionals.

Working with Optometry Cares – The AOA Foundation and AOSA’s charity of choice, we were able to continue our diversity, equity, and inclusion efforts by providing grant opportunities to underrepresented minorities interested in optometry. In 2023, 26 Opportunities in Optometry grants were provided totaling $39,000. In 2024, we will continue to share this grant program at undergraduate colleges, HBCU’s, and pre-optometry clubs across the country.

AOSA Executive Council
Derek Bryant (NSUCO) - President
Brooke Major (MCCO) - Vice President
Alisha Melton (IUSO) - Secretary
Will Mann (UAB) - Treasurer
Emily Benson, O.D., M.S. (OSU) - Immediate Past President

AOSA Staff
Jennifer Frawley, CAE - Executive Director
2024 House of Delegates
Report from AOA Center for Independent Practice

2023-24 Center for Independent Practice Accomplishments and Activities

Partner Schools: The AOA Center for Independent Practice (CIP) added Western University College of Optometry as the fifth CIP partner school (April 2024). Partner schools must have a commitment to 100% faculty membership for doctors of optometry on faculty (full or part time). Western joins Southern College of Optometry, Northeastern State University Oklahoma College of Optometry, The Ohio State University College of Optometry and University of Pikeville Kentucky College of Optometry as AOA CIP partner schools. The five CIP partner schools have the highest rates of faculty membership in AOA among all schools and colleges of optometry.

Annual Symposium: The 2023 Center for Independent Practice Symposium “How to Be Wildly Successful in Independent Practice” was held at Optometry’s Meeting® in Washington, D.C., supported by Johnson & Johnson. Tom Bowen, founder and CEO of Thrive Practice and Life Development, led the 2023 event, including a conversation about independent practice with a panel of leading doctors of optometry. The 2024 CIP Symposium will be held at Optometry’s Meeting in Nashville, Tennessee, on Thursday, June 20, from 2:30 p.m. to 5 p.m. Held in conjunction with AOA+ and open to all OM attendees, the 2024 event, sponsored by the Williams Group, will feature three free pop-up sessions:

- **Journey to Independent Practice** by Bill Nolan, President, Practice Transitions for Williams Group
- **Money! How to overcome debt and leverage it to achieve your practice dreams** with Joe McGrath (Laurel Road) and Frank Vivians (Bank of America)
- **Things I Wish I Knew: Secrets to Success and Happiness in Independent Practice** (panel of leading doctors of optometry)

Golden Opportunity Award: The Center for Independent Practice provided expertise to Optometry Cares®—The AOA Foundation and Professional Eyecare Resource Co-Operative Alliance (PERC) to develop the inaugural Golden Opportunity Award. Winners – to be announced at the AOSA Optometry Student Bowl™ XXXIII, powered by EssilorLuxottica in Nashville on June 20 during Optometry’s Meeting – will receive $50,000 to create the financial foundation of an independent practice. The award is named for David Golden, O.D., co-founder of PERC, who was passionate about elevating those around him, helping others climb the ladder of success.
**New Resources:** The Center for Independent Practice created a new member benefit – a Corporate Transparency Act (CTA) compliance tool (Dec. 2023). Federal law requires optometry practices and other businesses with fewer than 20 employees and less than $5 million in receipts to report certain ownership information to the U.S. Department of the Treasury.

**Free Educational Webinars:** Under the CIP’s “Practice Matters” banner and offered through AOA’s EyeLearn platform, the Center for Independent Practice produces webinars for students and doctors. The first two live webinars were held and are now available on demand on EyeLearn:

- Practice Matters: Starting a New Practice (Nov. 2023)
- Associate to Owner: A Path to Success in Independent Practice (Dec. 2023)

**Free Educational Programs for Students:** The Center for Independent Practice brought Erich H. Mattei, MBA, President & Chief Vision Officer of Akirnos, to speak at its partner schools. Mattei spoke to students at SCO (Jan. 2024), NSUOCO (March 2024), KYCO (March 2024) and OSU (April 2024) on a variety of topics related to getting started in independent practice. CIP also participated in the New England College of Optometry’s Spirit Week (Sept. 2023) with a virtual presentation by Tom Bowen, founder and CEO of Thrive Practice and Life Development, and conducted a pop-up panel with leading California doctors of optometry for students at the Western Regional Conference (Oct. 2023).

**Practice Transitions and Business Protection:** The Center for Independent Practice assisted AOAExcel to initiate a pilot program in February 2024 to help mid-career doctors of optometry plan and protect their practices and financial futures. CIP and AOAExcel continue to develop the program as a potential new member benefit.

**Sponsorship:** Generous support by Johnson & Johnson funded all Center for Independent Practice activities in 2023.

**Center for Independent Practice Steering Committee:**

- AOA Immediate Past President Robert C. Layman, O.D., chair
- AOA Vice President Jacquie M. Bowen, O.D., vice chair
- Southern College of Optometry President Lewis Reich, O.D., Ph.D.
- Northeastern State University Oklahoma College of Optometry Dean Douglas Penisten, O.D., Ph.D.
- The Ohio State University College of Optometry Acting Dean Jeffrey Walline, O.D., Ph.D.
- University of Pikeville Kentucky College of Optometry Dean Renee Reeder, O.D.
- Western University College of Optometry Founding Dean Elizabeth Hoppe, O.D., M.P.H., Dr.PH.
- Tara DeRose, O.D. (Colorado)
- Erick Henderson, O.D. (Pennsylvania)
- Aaron McNulty, O.D. (Kentucky)
- Staff: CIP Executive Director Rodney Peele, J.D.
2024 House of Delegates

Report from Commission on Paraoptometric Certification

2023-2024 Commission on Paraoptometric Certification

Janet Millis, CPOT - Chair
Beverly Roberts, CPOT - Vice Chair
Stacey Thibodeau, CPOT, CPOC - Immediate Past Chair
Tamara Franklin, CPOT - Member
Matthew Baseley, CPOT, CPOC - Member
Roberta Beers, CPOT - Member
Cecelia Koetting, O.D. - Member-at-Large
Angela Weger, CPOT, CPOC - Member
Sally Greeley, CPOT - Member
Sasha Radford, O.D. - Member
Al Suguitan, CAE - Public Member
Teri Geist, O.D. - Liaison Trustee
Sharon Alderson - Staff Liaison

The Commission on Paraoptometric Certification (CPC) offers three levels of certification plus a specialty coding certification. The Certified Paraoptometric (CPO), Certified Paraoptometric Assistant (CPOA) and Certified Paraoptometric Technician (CPOT) examinations are all nationally accredited by the National Commission for Certifying Agencies (NCCA). Accreditation serves as a benchmark on how organizations should conduct certification. NCCA uses a peer review process to establish accreditation standards, evaluate compliance with the standards, recognize organizations/programs that demonstrate compliance, and serve as a resource on quality certification. The CPC was granted reappraisal of NCCA accreditation through March 2027. The commission strives to assure that the CPC continues to meet the NCCA accreditation standards.

Each examination level consists of a recommended self-study program and computer-based examination. Paraoptometric certification provides a formal declaration of education and skill achievement by:

- Recognizing individuals who meet all requirements of the Commission on Paraoptometric Certification.
- Encouraging continued advancement of the educational skills of the paraoptometric.
- Establishing and measuring the level of knowledge required for certification of paraoptometrics.
- Promoting a standard of requisite knowledge required for certification, thereby assisting the employer, public and members of the health professions in the assessment of paraoptometrics.

Commission Activities

- In 2023, 1,324 computer-based paraoptometric certification examinations were administered, with over 56% passing. In February 2024, 183 candidates were tested; 59% of CPO and 37% of CPOA candidates passed while 86% of CPOCs passed. By the end of March 2024, 174 paraoptometrics were registered for a May, August, or November 2024 exam.
- 743 paraoptometrics, or approximately 43% of those due, renewed their certification in 2023.
- With the assistance of Professional Testing Corporation, the CPC completed the 2023 Job Task Analysis (JTA). The survey of certified and uncertified paraoptometrics and doctors of optometry
was distributed last summer. Results are being used to develop updated examinations for release in 2025. New for 2025, the CPC will offer a single combined written and clinical CPOT examination. Those who have begun CPOT testing must complete both parts of the examination in 2024 or pass the one examination in 2025 or later to earn the CPOT credential. Two CPOTs and one optometrist spent three days with Professional Testing Corporation in New York, recoding thousands of items in the current CPC item bank to align with the new content outlines. Expanded content outlines for the 2025 CPO, CPOA and CPOT examinations have been developed, based on the JTA survey results. The Education Center will use these outlines to create certification preparation materials that align with the new examination content.

- The CPC began offering live Remote Proctored Testing (RPT) examinations in August 2023. A total of 39 candidates participated in RPT. The pass/fail rate for this group was comparable to the pass rate of the candidates who tested at a Prometric facility.
- The CPC continues to review and update policies and procedures to ensure compliance with the revised NCCA standards.
- The 2023 Year in Review Report has been published on the AOA website.
- The annual NCCA accreditation report for 2023 is being prepared and will be submitted by the June 1 due date.

The work of the CPC is conducted through four standing committees:

**Coding Certification Examination Committee** – Chair: Stacey Thibodeau, CPOT, CPOC
- Solicits and develops new exam items and reviews all items submitted by its members or other paraoptometrics. Committee members and subject matter experts also participate in the annual review of test items for the Certified Paraoptometric Coding (CPOC) Exam. Item reviews have been scheduled for April 2023.

- **Item-Writing Committee** – Co-chairs: Beverly Roberts, CPOT, and Sasha Radford, O.D. The item-writing committee encourages collaboration amongst committee members as well as individual item writers while providing guidance for developing new examination item writers. New items have been submitted for review and possible placement on future examinations.

**Continuing Education Review Committee** – Chair: Cecelia Koetting, O.D.
- This committee reviewed and approved a total of 837 new hours of paraoptometric continuing education that were submitted by 59 organizations in 2023. CE forms for another 237 hours of previously approved CPC CE hours were provided upon request.

**Certification Examination Committee** – Co-Chairs: Catherine Firman, CPOT, and Tami Franklin, CPOT
- Reviews and solicits items for the CPO, CPOA and CPOT written and clinical exams.
- Annual item review meetings for CPO, CPOA and CPOT examinations have been conducted via conference calls in March and April 2024.
- The 2023 annual test review meeting was held virtually in July with guidance provided by Professional Testing Corporation. During this meeting, exam items selected for use on the 2024 CPO examinations were reviewed for clarity, accuracy, and continued relevance to ensure uniform quality of the examinations year to year and in accordance with the current exam outlines. The next annual test review meeting is scheduled for July 11-14, 2024, in St. Louis. The forms for all 2025 examinations will be reviewed and approved during this meeting.
Examination Results and Certification Renewal Statistics

The CPO, CPOA and CPOC examinations are administered during two-week periods in February, May, August, and November. The CPOT written and clinical examinations are offered in May and November. CPO, CPOA and CPOT candidates who can meet the technical and testing space requirements may choose to take their examination remotely. Remote testing is not offered to CPOC candidates.

CPO Examination
- More than half (56%) of the 1,044 CPO testers received a passing score. Nearly 47% percent of the passing candidates indicated they had one to three years of experience.

CPOA Examination
- 198 candidates sat for the exam with 58% receiving a passing score. Sixty-four percent of the 36 repeat candidates passed their exam, while 56.8% of first-time candidates were successful.

CPOC Examination
- 24 candidates sat for the exam with 67% receiving a passing score. The most experienced group of candidates with five or more years of experience had an 80% passing rate.

CPOT Examination Part 1 (Written)
- 29 candidates sat for the exam with 24 (82.8%) receiving a passing score. Both repeat candidates passed.
- CPOT candidates must pass both the written and clinical exams within an 18-month period before attaining the CPOT designation.

CPOT Examination Part 2 (Clinical)
- 29 candidates also sat for the clinical exam with 83.9% passing on the first or second attempt.

The CPC’s full 2023 Year in Review report may be viewed on the AOA website: https://www.aoa.org/education/paraoptometric-certification-exams/cpc-annual-reports
The Contact Lens and Cornea Section (CLCS) Council has remained active and engaged in 2024. The CLCS is focused on educating and sharing resources regarding exciting new developments in the contact lens space. Our educational efforts continue and the CLCS Council will be leading a series dedicated to caring for presbyopic patients in 2024. This will be a three-part series which gives an opportunity to discuss new technologies in contact lenses and pharmaceuticals as well as educating how to overcome barriers to incorporating those new technologies. As contact lens wear can be hugely impactful for patients at all stages of life, the council is committed to focusing on the wide-ranging innovation and impact of these medical devices.

The council led an educational series last year focused on myopia management. This year, CLCS is working with the AOA Research and Information Committee to survey those who participated in the series. The survey asks questions to gauge whether attendees feel there is sufficient evidence-based research to support myopia management, whether the series influenced them to incorporate myopia management into their practice and specific ways the series influenced their approach to myopia management. The council fully recognizes that many doctors may still have questions about how to implement myopia management into their clinical offerings. The CLCS Council stands ready to assist any doctors interested in taking the first step to incorporating this clinical intervention into practice.

In addition to educational efforts, the council is committed to engaging and supporting a new generation of contact lens experts. Our efforts to engage students and new doctors continue. AOA will again offer the CLCS Honorable Distinction Program in 2024 at Optometry’s Meeting®. The requirements for the distinction program include (1) attending two hours of contact lens or anterior segment continuing education at Optometry’s Meeting; (2) attending at least one CLCS programming event; (3) attending one CLCS networking event; and (4) visiting CLCS sponsors in the exhibit hall. Students who qualify for the Honorable Distinction Award will earn a pin, a certificate and an extra item for their CV.

The council looks forward to hosting an in-person Contact Lens and Cornea Section Residency Forum in August 2024. Sponsored by CooperVision, the 13th Annual CLCS Residency Forum will be an exciting program of networking and education. Highlights from the agenda include a small group discussion on caring for kids, a wet lab and clinical case presentations. This event remains a critical touch point for engaging with future leaders in contact lenses.

The council also continues to serve as a resource for AOA in development of outreach and strategy with federal agencies related to the sale of illegal contact lenses. The AOA has been mounting pressure on federal regulatory and health agencies to take “real action” that keeps Americans safe. AOA and affiliates have spent years documenting and sharing cases of patient harm related to contact lens products and
business practices with market regulators. CLCS encourages doctors to continue to report on any potentially illegal contact lens sale. Better documentation of illegal contact lens sales helps the AOA build a case for increased enforcement by federal regulators, such as the FTC, DOJ and FDA. Doctors can report illegal sales or adverse events related to contact lenses to stopillegalCLs@aoa.org.

The council looks forward to continuing efforts to educate, advocate and influence in 2024 and beyond.
With strategic ties to the AOA and AOSA, strong volunteer leadership and generous donors, Optometry Cares®—The AOA Foundation supports a range of programs that create a stronger and more supportive landscape for optometry. During the past year, the foundation achieved their mission of empowering the profession and providing awareness and access to health and vision care for the public through the following achievements thanks in part to your steadfast and sincere contributions.

Doctors of Optometry encourage parents to include a trip to the optometrist on the list of well-baby check-ups. Comprehensive eye and vision assessments at six to twelve months of age can determine the healthy development of vision. Early detection of eye conditions is the best way to ensure an infant has healthy vision for successful development—now and in the future. Embarking on its 19th year, Optometry Care’s public health program, InfantSEE® helps establish a lifetime of eye and vision health care. Since it was established in 2005, InfantSEE has impacted the lives of more than 170,000 babies and their families. As one of the foundation’s pillar programs, more than 4,000 AOA member doctors of optometry volunteered this past year to provide these life-saving assessments.

To continue spreading the word about the great work that the InfantSEE program is doing, we revamped our InfantSEE & Children’s Vision Grassroots Advocate Program this past year. We have a passionate advocate and InfantSEE provider in each state and works with their state affiliate to share InfantSEE’s message about the importance of children’s vision and eye care to both doctors in their state and community members.

Disasters of all shapes and sizes can be devastating to a practicing doctor of optometry, limiting or even cutting off their ability to provide care. Optometry’s Fund for Disaster Relief (OFDR) was created to provide grants to impacted doctors so that they can restore patient care when it is needed most. In 2023, impacted doctors were impacted by the devastating wildfires in Hawaii, historic flooding and other individual disasters. Earlier this year, the Change Healthcare cyberattack, cast a shadow over our healthcare system, leaving doctors of optometry struggling to access vital funds from processed claims, difficulties for our colleagues to sustain their practices and serve their communities effectively. To help doctors of optometry impacted by these events, AOA and Optometry Cares’ leadership made the decision to recognize the cybersecurity attack as an eligible disaster under OFDR. By extending our assistance, OFDR has provided 150 grants to help doctors return to what they do best: seeing their patients. Since its inception in 2005, OFDR has provided over $1.3 million to over 600 doctors.

Your generosity also empowers future generations through our Student Scholarship program. In March 2024, Optometry Cares awarded a total of $15,000 to three deserving optometry students. They included: Meagan Seufert, a student from Pacific University College of Optometry, who was awarded the Dr. Larry J. Alexander Scholarship for Education, Shawn Matsumoto a student at State University of
New York College of Optometry, who was selected for the Dr. Seymour Galina Scholarship and Faye Nie, a student from Southern California College of Optometry, who was awarded the Bernard Maitenaz Scholarship. Applications for the foundation’s 2025 scholarship awards will open this August.

The AOA/AOSA Opportunities in Optometry Grant program promotes diversity and equity within the profession by awarding pre-optometry students from underrepresented minority groups a stipend to assist with the initial costs of applying to optometry school. Since the launch of the program in 2021, nearly $120,000 has been provided through over 90 grants to help increase diversity and equity within the profession. Through the work of this joint initiative, optometry’s advocates are listening closely to colleagues nationwide to ensure optometry leads in engaging and encouraging a diverse, equitable profession going forward.

The Optometric Historical Society (OHS) which serves to protect and promote the historical legacy of the profession, also supports the Archives and Museum of Optometry, Hindsight: The Journal of Optometry History and the “Blast from the Past” Challenge. The Archives and Museum of Optometry encourages the collection, preservation and exhibition of artifacts and archival material that document the history of the profession, practice and science of optometry and the optical industry. Hindsight: The Journal of Optometry History is a publication of the OHS that contributes new knowledge to optometry history, interprets historical sources from unique perspectives, and guides others in their research. The “Blast from the Past” Challenge involves three optometry student finalists presenting media highlighting influential people, events and developments in optometry history. Then, the attendees vote to award the first-, second- and third-place winners.

Dr. W. David Sullins, Jr. was an inspiring and passionate leader and a driving force in optometry. In his honor, the Dr. W. David Sullins, Jr. InfantSEE Award recognizes an individual doctor of optometry who has made significant contributions to optometry in their community and for outstanding public service involving the InfantSEE program. Deborah Bernay, O.D, from our Texas affiliate, will be awarded the 2024 Dr. W. David Sullins, Jr. InfantSEE Award to recognize her commitment to the program during the AOA Advocacy Awards and National Optometry Hall of Fame Induction Ceremony at Optometry’s Meeting on Friday, June 21.

Thank you for your unwavering support and partnership. As optometry’s charity of choice, Optometry Cares is actively shaping the future of our profession and safeguarding its legacy.

2024 Board of Directors

Executive Committee:
Belinda Starkey, O.D., President
Hilary Hawthorne, O.D., Vice President
Teri Geist, O.D., Secretary/Treasurer

Board Members:
Paul Barney, O.D.
Jacquie Bowen, O.D.
Jason Compton, O.D.
Brad Lane, O.D. MBA, MeD
Marrie Read, O.D., MBA
The Paraoptometric Resource Center (PRC) offers a library of educational resources and training materials to advance the skills and professional development of all paraoptometrics from beginner to advanced levels of competence. The PRC is led by a committee comprised of AOA paraoptometric members and member optometrists. The PRC Committee goals are to assist all associate member paraoptometrics reach their full potential, advance their career in pursuing paraoptometric certification, and increase their knowledge through recognition, volunteer opportunities and education.

**2023 PRC Committee members:**
- Erlinda Rodriguez, CPO, Chair
- Heather Tibbetts, CPOT
- Heather Schwartz, CPOT
- Barb Wholk, CPOT
- Jessica Schiffbauer, O.D.
- Melanie Jenkins, CPO
- Tammy Petrosyan, O.D.
- Kimberly Pickle, CPOA
- Brianne Speaks, CPOA
- Brandy Yeack, CPOA
- Michele Donovan, O.D.

**AOA Staff:**
- Sarah Sutherland, MAT, Director of Strategic Education Initiatives
- Kortnie Herren, Senior Content & Curriculum Manager
- Michelle Dorsett, Senior Content & Curriculum Manager
- Keegan Palzkill, Education Analytics Technologist

The Committee goals for 2024 are being met through specific projects and programs as follows:

The AOA PRC Committee continues to focus on accomplishing all its goals and to develop resources and content for the specific projects.

1. **Paraoptometric Certification:** The committee is updating certification study materials for all levels of certification to cover each topic included in the new Commission on Paraoptometric Certification (CPC) expanded outline for the 2025 examinations. These updates will assist candidates studying for the new examinations to be launched in 2025. New study halls and practice tests will be offered including newly identified components of the new examinations.

   Study Halls will continue to be provided for candidates taking certification exams for all levels. The exam review and the CPC exam prep materials are accessible in EyeLearn for members at no cost and non-members for a fee.

   A new document has been launched in Eyelearn called “2020-2024 Certified Paraoptometric CPO Exam: Study Resources”. This document details all the study resources and exam prep content available in Eyelearn from 2020 to 2024 in one document for easy access by a candidate preparing for the CPO exam. Articulate, an online E-learning study resource, will also be available. A new phone app for Eyelearn has been launched for easy access to all study resources and webinars.
2. The committee continues to focus on the following Micro-credential Programs:
   
   - **Scribing**: This program will cover all the necessary training and resources in Scribing. The participant will be required to complete an assessment test to obtain a certificate of completion. The course is optometric specific. This program will be finalized and ready in 2024.
   
   - **Paraoptometric Surgical Assisting**: This program has been finalized and is ready for all affiliates to use in regional meetings. It includes eight hours of theory available in EyeLearn and a four-hour hands-on workshop. The participant must pass a written assessment test in EyeLearn and successfully complete all the 14 hands-on workshop skills assessments to obtain the micro-credential certificate.

3. **Para Onboarding Course Part II**: Part 1 of the Para onboarding course for new hires is available for all members as a resource in EyeLearn. The committee is working on developing a Para Onboarding Course Part II at a more advanced level.

4. **Para Speaker Series Educational Webinars**: This program offers monthly webinars with timely topics presented by expert speakers for paraoptometric continued education and to advance paraoptometric knowledge and professional development. These courses are made available for all members in EyeLearn. This is an ongoing program. The committee continues to focus on developing new and current topics to meet the educational needs of all paraoptometric members.

5. **OptoCasts**: The committee will be developing podcasts for EyeLearn with new and informative topics.

**Optometry’s Meeting:**

- Paraoptometric courses will include topics that are timely and comprehensive for paraoptometrics in their distinct roles in a contemporary optometric practice. The joined OD and Paraoptometric courses being offered provide current topics specific to their role and enhancing teamwork, including surgical assistance, low vision, frame adjustments, electronic health records data input and contact lens workshops. The committee will be present at the exhibit hall in a booth called Para Connection to bring awareness and provide information to all attendees on all the resources available for paraoptometric education and training and certification exam prep materials.

- The Committee will be engaging paraoptometrics in the Idea Exchange event during which different topics will be presented and shared providing an opportunity for the participants to increase their knowledge and motivate professional growth.

**Industry Relations:**
The Paraoptometric Award Program continues to be sponsored by Alcon.

**2024 Award Recipients:**
Paraoptometric of the Year Award–Savanna Johnson, CPOA
Community Service Award–Shelby Miller, CPO
Lifetime Achievement Award–Sally Greeley, CPOT
Academy’s Annual Meeting 2023 – ‘Nawlins’ Style

The 2023 annual meeting of the Academy showcased New Orleans as one of America's premier cities to more than 7,000 attendees. With its Convention and Exhibition Center serving as a splendid venue, the city offered an outstanding backdrop for the event. Additionally, the Academy welcomed 257 new Fellows and 12 Diplomates into its esteemed membership during the gathering.

Featuring almost 430 hours of continuing education (CE) and over 150 exhibitors, the conference catered to diverse interests. Attendees found an abundance of events and networking chances, resulting in high praise for their Academy 2023 New Orleans experience. The event's impressive Net Promoter Score (NPS) of 73% and stellar satisfaction ratings reflect the significant value attendees derived from both the conference and its associated activities. This outstanding NPS positions the Academy among the top 25% of associations recommended most enthusiastically by their members.

The most attended sessions at Academy 2023 New Orleans included the Plenary Session: Mental Health in Optometry that featured Brandon Marshall, former NFL player, Visual Field Defects: Looking Beyond Glaucoma - A. Mika Moy, O.D., FAAO (Recipient of this year’s Vincent Ellerbrock Clinician Educator Award), An Update on Inherited Retinal Diseases - Raman Bhakhri, O.D., FAAO, Xiao (Shawn) X. Yu, O.D., FAAO, Choroidal Neovascularization – How Not To Miss It! - Michael Yapp,
FAAO, and The Evidence-based Work-up for Retinal Vein Occlusions - Andrew Mick, O.D., FAAO, Sandra Harpster, O.D., FAAO.

At the Academy’s annual awards ceremony, attendees had the opportunity to hear the research updates of the most prestigious awards of the Academy and the Foundation, the Charles F. Prentice awardee, Eric Papas, Ph.D., BScOptom, and the Glenn A. Fry award recipient, Alex Bowers, Ph.D., MCOptom, FAAO. The Section on Cornea, Contact Lenses & Refractive Technologies awarded its Founders award to Ralph Stone, Ph.D., and the Max Schapero Lecture award to Jason Nichols. The Public Health & Environmental Vision Section conferred its Henry B. Peters Award to Padhmalatha Segu, O.D., FAAO.

Sustainability Initiatives

In 2023, the Academy created a new Sustainability Task Force responsible for identifying and implementing sustainability initiatives.

We’re pleased to share the following initiatives as a sample of what was accomplished already during Academy 2023 New Orleans:

- Recycled Materials: The lanyards and bags provided at registration were crafted from recycled content.
- Eco-friendly Food Service: Only compostable or recyclable materials were used in the Exhibit Hall.
- Canned Rain Water: Where boxed lunches were served, bottled water was replaced with recyclable/reusable aluminum bottles with rain water.
- Carpet Reuse: The Exhibit Hall carpeting was repurposed from a previous meeting.
- Water Stations: Numerous water stations were available
throughout the center and attendees were encouraged to bring their reusable water bottles to participate.

- Digital Signage: Digital materials were utilized over printed items whenever possible.
- Bausch + Lomb ONE by ONE Recycling Program: Contact lens recycling stations were available in contracted hotels and the convention center.

Thank you to our corporate partners, Alcon, Bausch + Lomb and EssilorLuxottica, who contributed to these efforts.

**Diversity, Equity, Inclusion & Belonging (DEIB Committee)**

The Academy is committed to uplifting and promoting diversity, equity, inclusion, accessibility, and belonging at every level of the Academy to drive meaningful change that will advance the Academy’s mission and its commitment to promoting health equity in eye care.

Diversity refers to the variety of personal experiences, values, and views that define our unique differences including race, ethnicity, religion, size, language, socioeconomic status, national origin, sexual orientation, age, gender identity, political belief, neurodiversity, physical ability and more.

The Academy recognizes that the current Academy membership does not adequately reflect the demographics of the U.S., and while we understand that progress has begun, there is much more work to do. The Board has created targeted strategies, including the formation of the new Diversity, Equity, Inclusion, and Belonging (DEIB) Committee to advance key initiatives further.
The Board of the American Academy of Optometry is dedicated to ensuring diversity in its composition, as well as within its committees, sections, SIGs and staff. The Board highly values the engagement of individuals that vary by background including race, ethnicity, religion, size, language, socioeconomic status, national origin, sexual orientation, age, gender identity, political belief, neurodiversity and physical ability.

Our Goals

- Foster a diverse, equitable, accessible, and inclusive environment.
- Encourage the diversification of our leadership, committees and membership to cultivate a professional community that mirrors the diversity of the communities we serve to advance health equity.
- Promote accountability through data collection and reporting.
- Advocate that diverse voices and perspectives are heard, respected and invited into all facets of education and research.
- Enhance accessibility at the annual meeting.

**2023 Inaugural Leadership Summit**

The Academy offered its inaugural Leadership Summit in Scottsdale, Arizona in April 2023, hosting over 100 of the Academy’s leaders representing more than 500 Academy volunteers for a two-day dynamic leadership retreat to brainstorm innovative ideas and strategies. At this gathering, Academy leaders shared robust opportunities to gain insight, explore ideas, collaborate with their peers and influence the direction of our Academy.
Volunteers ‘a Plenty

Academy welcomed new Committees, Special Interest Groups, and Chapters in 2023

Committees

- International Committee
- Symposium Committee

Special Interests Groups (SIGs)

- Academic Optometry SIG
- Community Health Centers SIG
- Ocular Telehealth SIG
- Ophthalmic Laser and Surgical Procedures SIG

Chapters

- Africa Chapter
- Nigeria Chapter
- Ohio Chapter

Fellowship Candidate Crash Course

The Fellowship Candidate Crash Course (FCCC) is designed to prepare prospective members to become Fellows of the American Academy of Optometry (FAAO). The FCCC features five weeks of live one-hour webinars that will discuss the various aspects of the Candidate for Fellowship application process such as case report selection and writing, research, oral examination preparation and more. During this time, program participants are matched with a mentor and write a Fellowship-quality case report. Following the completion and approval of this case report, participants will complete a virtual oral examination. Upon successful completion of the FCCC, participants will walk away
with the tools to achieve the FAAO designation in addition to 10 of the required 50 points needed to become a Fellow.

**Clinical Insights in Eyecare Journal is Launched!**

Clinical Insights in Eyecare Journal, launched in Fall 2023, is the peer-reviewed online case report journal of the American Academy of Optometry. It welcomes original and unpublished case reports/series that are highly relevant to clinical eye care. The case reports highlight diagnostic dilemmas, applications of clinical technology, or treatment effects/considerations. The articles are educational and are intended for the clinician or clinical scientist in the care of patients. Although original research/investigations and reviews are beneficial to clinicians, the focus of the journal is on case reports and series.
2024 House of Delegates
American Academy of Optometry Foundation

Advancing Eye Care through Philanthropy

Report from Rachel “Stacey” Coulter, O.D., MS, FAAO, FCVO
President, Board of Directors

The American Academy of Optometry Foundation (AAOF) advances optometry through direct financial support for research, education and programs. Each year, hundreds of optometrists, vision scientists and optometry students benefit from the foundation’s work and the incredible generosity of our donors and sponsors.

In 2023, the AAOF distributed more than $1.2 million in scholarships, grants, awards and special funds to students, residents, faculty and researchers.

- William C. Ezell Fellowships: Named in honor of the foundation founder, the $8,000 award has been considered a flagship scholarship. It supports graduate students enrolled in a full-time program of study and training in vision-related research, which leads to a master’s degree or Ph.D. In 2023, AAOF awarded $152,000 to provide financial assistance for 16 optometrists seeking an advanced degree. In addition to the award, recipients also receive $750 travel awards to attend the American Academy of Optometry and ARVO annual meetings. Sixteen Ezell Fellowships will be awarded in 2024.
- Resident Awards: The AAOF provided nine $2,000 awards to residents currently serving in a residency through a North American school or college of optometry. Awards support talented optometric residents who demonstrate a passion and commitment to practice, research and education.
- Student and Resident Travel Awards: During 2023, one hundred twenty awardees received an award of $750 to attend the Academy’s annual meeting. Awardees represented all schools and colleges of optometry in North America and Australia.
- International Travel Awards: The AAOF increased its commitment to international travel awards in 2023. Ten optometrists, who reside in a low- to lower-middle income country according to the World Bank Index, received awards of $1,500. Countries represented were Ghana, Nigeria, Nepal, Malawi, Pakistan and India.
- AAOF Excellence in Diversity Awareness and Education Award: This award honors those who lead our profession by enhancing diversity and inclusion efforts. Dr. Vondolee Delgado-Nixon was the recipient in 2023.

As the philanthropic arm of the American Academy of Optometry (AAO), the AAOF initiated additional programs in 2021 to support the strategic plan of the Academy. These programs include:

- Research Funding: Stimulating new investigations in the field of myopia continues to be a priority for AAOF. In 2023, the Foundation provided funding of $435,436 to three new research studies. AAOF also awarded its annual $10,000 pediatric pilot grant.
• Clinical Investigator Certification (CIC): The eight-week course provides practicing optometrists with the training and skills necessary to serve as a clinical investigator for sponsored clinical research trials within their practice setting. 111 Academy Fellows have earned a certificate of completion with the next class of 25 participants beginning on April 9, 2024.

• Staff Training Fundamentals: The sixteen-module curriculum provides a basic foundational education for employees who are new to the eye care profession. More than 600 Academy Fellows have previewed or enrolled in the program.

• OD to PhD: A $30,000 scholarship for doctors of optometry who are pursuing a Ph.D. in a vision-related field, including vision science, physiological optics, biomedical sciences, public health, education (emphasis on optometric education), neuroscience and psychology. In 2023, AAOF awarded two scholarships.

• Clinical Podcast Series: A program designed to provide summaries (video podcasts) of trending, clinically relevant research which may directly translate to improved patient care. Podcasts are distributed monthly to Academy members featuring expert clinicians and researchers. The series has realized more than 10,000 downloads with a global reach.

• Future Focus on Optometry: The program extends outreach to underrepresented minority high school and college students regarding the profession of optometry. Students engaged in a half-day on-site educational session during the Academy meeting which included presentations by AAO Fellows and a tour of the exhibit hall. Follow-up mentoring and education on optometry as a career path will be provided.

The American Academy of Optometry Foundation continues to fulfill its mission “to provide financial support to students, residents, faculty and researchers for optometric research and education in vision and eye health to improve clinical patient care.”

For more information about the AAOF and its programs or for ongoing updates, please see our webpage: https://aaopt.org/about-us/foundation/
The American Board of Optometry (ABO) was founded in 2009 as a non-profit organization that board certifies optometrists in the United States. We were established to serve the public and the optometry profession by assessing and certifying the competency of optometrists. Board certification is a voluntary process that sets educational standards, assesses knowledge of the latest practice standards and offers a means of demonstrating ongoing clinical competence through maintenance of certification.

Our annual board of directors meeting will be held in Nashville, Tennessee, on June 18, in conjunction with Optometry’s Meeting®. We will review and assess strategic performance, define our focus for the upcoming year and address financial challenges facing the organization.

Student and Resident Outreach

The majority of new ABO Diplomates are recent graduates or residents. Approximately 80% of new candidates have graduated from optometry school within the last 10 years, recently completed a residency or are active-duty military. The remaining candidates are established doctors of optometry, many who practice where board certification is a requirement for employment. Recognizing the shift in demographics for new applicants and the challenge of ensuring all students and residents understand the importance of board certification, ABO launched a student and resident outreach program in the fall of 2023. The goal of the new initiative is to reach at least half of all students and residents each year through in-person presentations at selected optometry schools. In this first year of presentations, ABO staff have visited 11 schools, speaking to mostly fourth-year students and current residents. Planned visits will continue each year, adding schools as time and budget allows.

A committee has also been formed to begin exploring the development of a new student participation track, engaging third- and fourth-year students earlier in the board certification process. The committee will present initial recommendations at the board meeting on June 18.

Certificate of Added Qualification

In the summer of 2023 ABO launched a pilot Certificate of Added Qualification (CAQ) program, which provides diplomates the opportunity to earn a credential and maintain their board certification in a specialty area. Earning a CAQ allows board-certified optometrists to achieve recognition for their experience, skills and knowledge in a focused clinical area. ACAQ reflects optometrists are first grounded in the training and knowledge of primary eye care, which is enhanced but not replaced through specialized clinical practice.

Both the Glaucoma and Cornea/Contact Lens CAQs have generated interest from diplomates as well as new candidates. Upon meeting initial requirements, diplomates may take the final assessment to earn the CAQ.
during the annual assessment window from September 1-December 31. Once earned, diplomates will begin a new Maintenance of Certification (MOC) cycle with an emphasis in their chosen specialty area.

With a late launch in 2023, ABO intends to allow the pilot two full years before evaluating strengths and weakness and making any adjustments to the requirements or maintenance structure of the program. The board may also consider new CAQ focus areas at that time.

**Two New Awards Announced**

With expanding outreach efforts and a multitude of volunteers helping to make board certification a meaningful, relevant and engaging path to maintaining competency, ABO has introduced two annual awards. The first recipients will be announced at the annual board meeting on June 18 in Nashville, Tennessee. It is vital to support future optometrists and encourage lifelong learning as well as honor those who have made a difference in bringing board certification to the optometric profession.

Learning Through Clinical Care—Student Case Challenge: This contest is open to third- and fourth-year students and will award a monetary prize as well as a publishing opportunity to two winners. Submissions will be based on a clinical case the student has encountered with an emphasis on new information about a treatment modality or management approach or a good review of current practice guidelines.

Visionaries Award for Volunteer Service: This award will recognize an individual for the contributions they have made to the overall benefit and success of ABO through volunteering their time and effort.

The ABO Board of directors continues to believe that board certification in optometry is vital to maintaining parity with other medical specialties and growing optometry’s role in the national health care landscape. We remain committed to providing a relevant, valuable and focused learning experience that meets the needs of our diplomates and supports the effort to stay current in a contemporary health care environment.

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Diane Adamczyk, O.D., FAAO  
Chair, American Board of Optometry

April Wilhelm  
Executive Director,  
American Board of Optometry
The Association of Regulatory Boards of Optometry (ARBO) represents and assists member licensing agencies in regulating the practice of optometry for the public welfare. ARBO provides resources to licensing boards of optometry throughout the world. Our members include the licensing boards in the United States, the District of Columbia, Guam, Canadian provinces, Australia and New Zealand.

ARBO is currently in its 105th year of operations. During that time, we have developed a variety of programs to assist our member boards. We oversee the following programs: OE TRACKER for electronic tracking and verification of optometrists’ continuing education attendance; COPE (Council on Optometric Practitioner Education) for the accreditation of optometric continuing education activities and providers; and CELMO (Council on Endorsed Licensure Mobility for Optometrists) which offers a vehicle for license portability to optometrists looking to relocate from one state to another.

The COPE Council is made up of members from ARBO, the Association of Schools and Colleges of Optometry (ASCO) and the American Academy of Optometry (AAO). Utilization of the COPE accreditation system continues to increase. COPE accredited over 8,500 courses and activities in 2023 which were accepted by the state/provincial licensing boards for credit toward licensure renewal. COPE changed the course formats in 2023. Synchronous In-Person (formerly Live) courses accounted for 65% of courses accredited by COPE in 2023. Synchronous Virtual (formerly Online Interactive) courses accounted for 24% of courses accredited by COPE in 2023. Asynchronous (formerly Online Enduring) courses accounted for 11% of courses accredited by COPE in 2023.

COPE follows the same accreditation criteria and standards as those required by medicine’s CME accreditor, the Accreditation Council on Continuing Medical Education’s (ACCME). COPE’s accreditation system has been recognized as substantially equivalent to the ACCME’s accreditation system since 2017. This is an important tool that can be used in optometric scope of practice expansion efforts as optometrists that take COPE accredited CE are receiving comparable education to physicians taking accredited medical CME.

COPE continues to be a member of the Joint Accreditation for Interprofessional Continuing Education collaborative. Joint Accreditation offers organizations the opportunity to be simultaneously accredited to provide continuing education for athletic trainers, dentists, dietitians, nurses, optometrists, PAs (physician assistants), pharmacists, physicians, psychologists and social workers through a single, unified application process and set of accreditation standards. Joint Accreditation assures the public that health care teams receive education designed to be independent, free from commercial bias, based on valid content and effective in improving the quality and safety of care delivered by the team.
The Council on Endorsed Licensure Mobility for Optometrists (CELMO) offers a method for state optometry boards to confirm the credentials of optometrists applying for licensure by endorsement in a uniform and consistent manner. Twelve states currently recognize the CELMO certificate as a significant credential when evaluating an actively practicing optometrist for licensure.

OE TRACKER®

The growth rate of OE TRACKER has continued to accelerate. OE TRACKER now contains over 8 million attendance records. Over 68,000 optometrists from the U.S. and Canada have OE TRACKER accounts, and 96% of those contain CE attendance data. OE TRACKER allows ARBO’s Member Boards to do an electronic audit of the CE hours earned by 100% of their licensees with minimal staff time and cost. This is significant in that many of the Boards have limited resources. The OE TRACKER mobile app allows optometrists to record course attendance, review their course history and upload CE certificates using a phone or tablet. The mobile app is used by a variety of CE providers, including several state associations, to submit attendance directly to OE TRACKER. Over 800,000 attendance records have been submitted using the mobile app since it was developed. ARBO will be introducing an upgraded version of the OE TRACKER mobile app in June 2024.

ARBO Office and Staff
ARBO’s headquarters are located in Charlotte, North Carolina, with Ms. Lisa Fennell serving as Executive Director.

2023-2024 ARBO Board of Directors

Officers:
Jeffery Yunker, O.D., President
Patrick O’Neill, O.D., FAAO, Vice-President
Terri Haley, O.D., Secretary-Treasurer
Coby Ramsey, O.D., Immediate Past President

Consultants:
Donovan Crouch, O.D.

Directors:
James Campbell, O.D.
Glenn Kawaguchi, O.D.
Gerard Lozada, O.D.
Linda Tharp, O.D.
Margaret Whelan, MPA

ARBO Annual Meeting
ARBO’s 2024 Annual Meeting will take place in Nashville, Tennessee, June 16-18, 2024.

More information about ARBO can be found on our website at www.arbo.org. To contact the ARBO office, call 704.970.2710 or email arbo@arbo.org.
**ASCO’s Leadership**

At the forefront of ASCO’s leadership this year has been ASCO President Mark Colip, O.D., President of the Illinois College of Optometry. Dr. Fraser Horn, O.D., dean of the Pacific University College of Optometry, will ascend to the position of president in June.

This year saw several other leadership changes: We were thrilled to celebrate Dr. Karla Zadnik as she assumed her role as interim provost at The Ohio State University (OSU). Dr. Jeffrey Walline was named the interim dean of OSU’s College of Optometry. Dr. Nancy Coletta was confirmed as the dean of Massachusetts College of Pharmacy and Health Sciences’ School of Optometry. Dr. Renee Reeder was named dean of the University of Pikeville’s Kentucky College of Optometry. Dr. T. Rowan Candy was named interim dean of the Indiana University School of Optometry after Dr. Joseph Bonanno’s retirement. We also wish Drs. John Flanagan, David Heath and Douglas Penisten best wishes as they retire from their positions this year.

ASCO also has a new employee who joined our staff team this year: Madison Broderick joined ASCO as our new program associate for member engagement in May, and Jennifer Rubin was promoted to the position of manager of career and leadership development.

**Attracting and Developing the Future of the Profession**

Optometry’s schools and colleges play important roles leading the future of the profession. As the national organization promoting the advancement of optometric education, ASCO exists to facilitate and support that advancement through several strategic priorities. Here, we provide a brief update on ASCO’s top priority.

Optometry schools and colleges educate students so they can become the practitioners of tomorrow who will enhance the health and well-being of patients everywhere. In doing this, the schools and colleges advance the profession of optometry through the adoption of and training on the latest health care practices and technologies, and the conduct of pioneering research that expands practitioners’ capabilities and experience in the exam room. These objectives can only be achieved, however, if there is a robust, diverse and qualified applicant pool to optometry schools and colleges. Thus, the strength and health of optometry’s applicant pool is ASCO’s top strategic initiative.

In 2016-2017, ASCO’s educational institutions started reporting a troubling decline in awareness by America’s youth about the profession of optometry as a rewarding health career, resulting in a decrease in qualified applicants. ASCO started researching the phenomenon and saw this downward trend continue in the 2017-2018 application cycle. In response, ASCO launched its public awareness campaign, *Optometry Gives Me Life*, to use digital marketing and outreach to spread the word about how
optometry can be an exciting and fulfilling option for college-aged students looking for a career in a health profession.

The goal of ASCO’s Optometry Gives Me Life (OGML) campaign is to build a robust, diverse and qualified applicant pool for optometry schools and colleges by raising awareness of optometry as a career of choice. Specifically, the OGML campaign strives to:

- Increase awareness of optometry as a career option.
- Provide valuable content and experiences so that potential students can see firsthand what a career in optometry is like.
- Keep prospective students engaged across a multi-year journey.
- Encourage students to take the first step in their application journey – signing up to learn more.

Results from the first five years of this national award-winning campaign have proved that OGML has stemmed the downward trend in applications, resulting in a small but sizeable increase in applications, despite the advent of the COVID-19 pandemic, the national media attention on student debt and increasing competition from other health professions. This modest upswing has come at a time when other health professions have experienced downturns in their applicant pools, further pointing to the efficacy of the campaign. However, the risk of another downturn has not been completely abated and our aspiration of doubling the pool of applicants and buttressing the perception of optometry as a career of choice among undergraduate students pursuing a STEM degree have not been fully met. Last year, ASCO’s Applicant Pool Development Committee led a brainstorming session to explore new approaches around ways to broaden OGML’s reach. Focus groups and in-depth interviews with optometry students and some college students who elected another health profession were also conducted.

The results of these interviews and brainstorming sessions have led ASCO to make some changes to the campaign this year, including diversifying the key messaging to prospective applicants (i.e., adding messaging around optometry as a rewarding career that helps people); adding new social media outlets (such as Reddit); expanding our geotargeting around HBCUs and other undergraduate institutions; and increasing the number of social media influencers carrying our messages.

One big insight we gained from the focus groups was that this generation of students is uncomfortable reaching out to doctors of optometry, especially if they don’t know one, for information and personal insights, site tours, mentoring and/or shadowing experiences. This has led to our newest undertaking – the launch of ASCO’s Eye Opener Sessions, a kind of on-line matching service that links potential applicants with doctors of optometry, based on a variety of factors, such as geography, practice type, preferred communication method, etc. A special mobile app and website have been created (https://www.eyeopenersession.org/) where both doctors and students can sign up by answering a few questions to help them identify their matches. It is then up to the doctor and the student to determine the best time and method of communication (e.g., a phone call, Facetime, in-person meeting, shadowing experience, etc.). Both students and doctors are given a discussion guide to help get the conversation
started, and doctors also receive a Welcome Kit that includes Eye Opener identification/marketing materials to place in their practice, such as signage, window clings and stickers.

The American Optometric Association, the National Optometric Association and SECO are among the organizations helping us to get great doctors signed up to speak to students and share with them all the wonderful reasons why optometry is right for you.

ASCO offers marketing materials such as advertisements and social media posts to any state optometry association or other organization willing to alert their members to this easy opportunity to engage and encourage the next generation of optometrists. Please reach out to ASCO Director of Student and Residency Affairs Paige Pence at PPence@opted.org for more information. Or click on the QR code below to go directly to the sign-up page:

**Step 1**
Sign up for the Eye Openers program.

**Step 2**
Answer quick questions about why you love being an eye doctor, your hobbies, etc.

**Step 3**
We’ll match students with a short list of eye doctors who have similar answers; students select the OD they’d like to meet up with. Your level of engagement is up to you, from a 30-minute virtual conversation to an in-office shadow day.
The Great Western Council of Optometry (GWCO) is a non-profit association formed in 1991 to provide a common voice for members within organized optometry, facilitate communication, enhance professional development and provide financial support to affiliated state optometric associations.

Today, GWCO is comprised of 12 member state optometry associations including Alaska, Arizona, California, Colorado, Hawaii, Idaho, Nevada, New Mexico, Oregon, Utah, Washington and Wyoming.

GWCO Congress, which will take place October 17-20 this year, was developed to provide an educational venue for the optometric professional in GWCO member states to come together and receive high-quality, multi-track optometric education.

Congress continues to evolve as the board works to provide our attendees the best experience possible. In 2024, Congress will be held exclusively at the Hyatt Regency Portland, which is adjacent to the Oregon Convention Center. In 2025 we are moving to the Portland Marriott Downtown Waterfront, which will provide attendees with access to world-class restaurants in the heart of Portland’s business district.

GWCO is putting an added emphasis on our awards program, which acknowledges the amazing work being done by optometrists throughout the region. On Friday evening GWCO attendees will be able to attend a free reception where we will award our GWCO Optometrist of the Year, as well as our 2024 Lifetime Achievement Award winners. Both winners will be announced in August.

In partnership with Pacific University, GWCO Congress boasts one of the strongest student programs in the country. Nearly 200 students from the GWCO footprint attended on the final day of Congress to mingle with exhibitors, attendees and their peers. This includes an educational track geared directly to the students.

New this year for our exhibitors is a Vendor Experience that provides those exhibitors with a dedicated room where they can showcase their products away from the show floor. Many of the Vendor Experiences will take place at the same time as CE, which provides our exhibitors with additional time to promote their products to attendees.
The International Association of Optometric Executives (IAOE) met during the 2023 Optometry’s Meeting® in Washington, D.C., to conduct our IAOE Business Meeting. During this meeting, the IAOE elected their officers for the 2024-2025 year as follows:

- President – Richard Montoya (New Mexico)
- President Elect – Dinah Bevington (Kentucky)
- Vice President – Kari Cline (Wyoming)
- Secretary/Treasurer – Sarah Link (Mississippi)
- Immediate Past President – Bo Keeney (Virginia)

In November 2024, the IAOE met in Austin, Texas, for their Annual Conference and Business Meeting. The keynote speaker for the meeting in Austin was Mr. Jim Zieba (former Indiana executive director). Mr. Zieba provided an excellent program on “Strategic Leadership: How U.S. Army War College leadership concepts and lessons apply to optometric association executives.” The other highlight of the meeting was the “Industry Workshop – Best Practices to Support Affiliates.”

In 2024, the IAOE will meet during Optometry’s Meeting in Nashville, Tennessee, and for their Annual Conference in Louisville, Kentucky, in November.
Judicial Council

2023-2024 Report

In July 2023, The Judicial Council voted to “make effective” the following five (5) resolutions:

1. Resolution A Support for Student Attendance at AOA+ and other AOA and AOA Affiliate Association Events – Amending Resolution 2014
2. Resolution B Eye Deserve More Awareness – Amending – Amending Resolution 2015
4. Resolution D Vision Therapy and Orthoptics – Amending Resolution 1840
5. Resolution E AFOS Membership

The full text of all resolutions and motions is available on the AOA website, or you may request a copy by contacting the AOA General Counsel’s Office at (314) 983-4131 or legal@aoa.org.

Robert Layman, O.D. (Chair)
William Reynolds, O.D.
Hillary Hawthorne, O.D.
Douglas Totten, O.D.
Steve Loomis, O.D.

Mike Stokes, J.D., Staff
National Academies of Practice (NAP) is the alliance of professionals collaborating to transform health and well-being. NAP is a non-profit organization founded in 1981 to advise governmental bodies on our health care system. Distinguished practitioners and scholars are elected by their peers from multiple different health professions to join the only interprofessional group of health care practitioners and scholars dedicated to supporting affordable, accessible, coordinated and quality health care for all. NAP firmly believes that close collaboration and coordination of different health care professions, aligned through a common vision, can advocate for patients and model excellence in interprofessional and preventive care. NAP is dedicated to lifelong learning from, with and among different health care professions to promote and preserve health and well-being for society.

In working to advance Interprofessional education, scholarship, research, practice and public policy, NAP:

- Educates and informs our members and others.
- Facilitates collaborative scholarship and research opportunities.
- Recruits, engages, retains and mentors our network of members.
- Advocates the value of interprofessional practice and works to improve health care and policy for all.

**Values**

As an interprofessional organization representing multiple health professions, NAP is guided by and propagates four core values. These serve as the central tenets for all our official actions. **Our core values are:**

- **Collaboration:** To fulfill NAP’s vision and mission we foster a work ethic of interprofessional collaboration that is based upon learning with, from and about NAP members of all academies. We advocate and advance similar collaborative health care and education models.
- **Patient-Centeredness:** Optimal health care is patient-centered. Public policy, scholarship and health care practice must be patient-centric, and in the best interest, and inclusive of individuals, families and communities. NAP supports its members in developing and disseminating best-practice models, public policies and scholarship that enhance interprofessional collaborative care for all individuals.
- **Inclusivity:** NAP embraces diversity, equity and inclusion throughout the organization for our members and the stakeholders we advocate for and serve. We strive to support the development and implementation of models that ensure appropriate and equitable health care for all. We value and promote the contributions of all our diverse constituent members.

- **Interconnectedness:** We foster connections within and between academies and among members of all groups. We support and target initiatives that are designed to maximize these interprofessional interconnections to advance patient/client-centered public policies, scholarship and interprofessional collaborative care. Our collective, interconnected experience, education and wisdom will take us further together than individually.

Within the past year, the National Academies of Practice Optometry Academy (NAPO) has presented on the optometric profession at the NAP Annual Forum held in Washington, D.C. They also have presented informational posters at Optometry’s Meeting™ and at the annual AAO meeting. There has been ongoing interaction with the ASCO Interprofessional Education and Collaborative Practice Committee to find areas where joint efforts would benefit both groups.

At the recent forum, Dr. Richard Soden was installed as the chair of the optometry academy and Dr. Clarke Newman received the Dr. James Boucher Memorial Award in recognition of his contributions to interprofessional health care.

The National Academies of Practice has 16 academies within its structure. They are:

- Athletic Training
- Audiology
- Dentistry
- Nursing
- Nutrition and Dietetics
- Occupational Therapy
- Optometry
- Pharmacy
- Physical Therapy
- Physician
- Podiatric Medicine
- Psychology
- Respiratory Care
- Social Work
- Speech - Language Pathology
- Veterinary Medicine
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Report from The National Association of VA Optometrists (NAVAO)

The National Association of VA Optometrists (NAVAO) held its annual business meeting and reception on Thursday, October 12, 2023, at the Hilton Riverside in New Orleans, Louisiana.

Elected officers:  
Molly McGinty-Tauren, O.D., President  
Jerrett Mazzarella, O.D., Vice-President  
Megan Tomsik, O.D., Secretary  
Andrew Crist, O.D., Treasurer  
Kevin Mercado, O.D., Immediate Past President

Honored Guests:  
Ronald L. Benner, O.D., President, American Optometric Association  
Steven T. Reed, O.D., President-elect, American Optometric Association  
Jacquie M. Bowen, O.D., Vice President, American Optometric Association  
Teri K. Geist, O.D., Secretary-Treasurer, American Optometric Association  
Robert C. Layman, O.D., Immediate Past President, American Optometric Association

Keynote Speaker:  
Ronald L. Benner, O.D., President, American Optometric Association

The NAVAO board remains committed to the highest quality in veterans eye care provided by the most highly trained and accomplished workforce. NAVAO strives to maintain partnerships with AOA and AFOS, who can advocate for concerns pertinent to veterans’ eye care on a federal level; with ACOE who maintains and elevates the standards for post-graduate optometry residencies; and with NBEO which protects the public through validated competency testing.

NAVAO continues to advocate for legislative matters that address recruitment/retention of VA doctors of optometry and the transference to the physician pay scale. Additionally, NAVAO represents the concerns of optometrists with regard to the soon-to-be published National Standards of Practice that relate to scope included in licensure. AOA invited NAVAO members to visit Capitol Hill for a House hearing in September 2023. They have also invited NAVAO to its 2024 Capitol Hill Advocacy event in April, which will help advance legislation related to optometrists’ and physicians’ pay.

NAVAO would like to thank Dr. David Yang of Palo Alto HCS for his extraordinary service on ACOE’s council these past nine years. NAVAO considers it critical that his replacement be a VA residency program coordinator. Almost half of optometric residencies are VA positions and 75% of all VA optometrists are residency trained. It is important that VA maintain a voice on the council. We have communicated this position to both ACOE and AOA with the expectation our concerns will be supported.
NAVAO would like to thank the AOA for their continued support of VA Optometry. We appreciate their efforts and look forward to assisting with the advancement of the field of optometry in the future.
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Report from the National Board of Examiners in Optometry

The National Board of Examiners in Optometry® (NBEO®) expresses sincere appreciation to all who assisted us in advancing the assessment of optometric competency over the last year. We are committed to public protection through the development, administration, scoring, and reporting of examinations that reflect contemporary optometry. Please review the following key updates and organizational announcements.

New Part III PEPS Examination Coming August 2024

In August of last year, we announced the new Part III Patient Encounters and Performance Skills (PEPS®) examination will launch in August 2024 and replace the current Part III Clinical Skills Examination (CSE®). The new Part III exam will evaluate essential skills and measure a candidate’s ability to apply evidence-based knowledge to patient care. For more information regarding Part III PEPS, please visit https://optometry.org.

Registration for the Part III PEPS exam opened in March for the Class of 2025. Multiple helpful resources for the August 2024-May 2025 administrative year are found on the NBEO website including the Candidate Guide, Site Information and Equipment List, Evaluation Forms, Orientation Video, and an Interactive Computer Software Tutorial.

Practicing optometrists interested in submitting cases for the Part III PEPS examination may apply for authorship at https://nbeo.optometry.org/sme.

Laser and Surgical Procedures Examination (LSPE®)

There has been a steady increase in the number of candidates registering for the Laser and Surgical Procedures Examination (LSPE®), which is designed to assess optometric cognitive and technical ability to appropriately manage and perform laser and surgical procedures and administered at NBEO’s National Center of Clinical Testing in Optometry. LSPE is the only nationally standardized examination of its kind, measuring competency in laser and surgical skills, decision-making, and patient management. It is a stand-alone, elective examination containing both laser and surgical sections. Each section includes both a performance of clinical skills and computer-based multiple-choice items.
LSPE will be entering its sixth administrative year beginning in August 2024. Registration is open to 4th-year optometric students, optometric residents and optometric practitioners. Candidates may register to take LSPE in its entirety or to take the laser or surgical sections separately as needed. For more information on LSPE, please visit our website: https://www.optometry.org/exams/lspe.

**Part I ABS® Practice Items Databank and Part II PAM®/TMOD® Practice Items Databank Available***

NBEO has recently launched two new subscription-based, online tools to help candidates prepare for the Part I Applied Basic Science (ABS®) and Part II Patient Assessment & Management/Treatment and Management of Ocular Disease (PAM®/TMOD®) examinations. Candidates may subscribe to the Practice Items Databank(s) after registering for the respective examination(s). We continue to add additional content to the practice databanks.

**New Exam Registration System Launched**

NBEO launched a new exam registration system this year designed to enhance the candidate experience with an updated, friendlier user interface. The new system also has increased performance capabilities, including the ability to serve more concurrent users during peak registration periods.

As always, we appreciate your ongoing support, and look forward to working with you in 2024. Questions may be sent to nbeo@optometry.org.

*NOTE: SUBSCRIPTION TO AND/OR COMPLETION OF THE PART I ABS PRACTICE ITEMS DATABANK OR PART II PAM/TMOD PRACTICE ITEMS DATABANK DOES NOT GUARANTEE A PASSING SCORE ON ANY NBEO EXAMINATION.

**About NBEO** — Established in 1951, NBEO is an independent, non-governmental, non-profit organization whose examinations are universally accepted for optometric licensure in the United States and accepted internationally. NBEO’s mission is to protect the public by developing, administering, scoring, and reporting results of valid examinations that assess competency in optometry.
The National Optometric Association (NOA) continues to have influence 55 years later. We stand on our mission to “Advance the Visual Health of Minority Populations” and continue to focus on timely treatment and early detection of diseases of the eye. The recruitment of minority students into the schools and colleges of optometry and their placement into appropriate practice settings upon graduation remain priorities of the NOA.

In 2023, we held our annual convention in Fort Lauderdale, Florida, July 7-9. The NOA started the convention with our Serve Where You Go Initiative in partnership with the VSP Mobile Clinic and the Foster Park Community Center. The NOA and VSP partnership provided comprehensive eye examinations and glasses to more than 300 individuals in an underserved community with the support of the VSP Mobile Vision Van and our NOA & National Optometric Student Association (NOSA) volunteers. We had around 220 people attend our 2023 convention.

- The NOA provided $25,000 in travel grants to NOSA students to help with the students’ travel expenses to get to the convention. Travel grants increased by $15,000 in 2023.
- The NOA provided $130,375 in scholarships due to the help and support of the National Optometric Foundation and our corporate partners.
• The NOA/NOF HBCU “Visioning the Future” program awarded 10 HBCU students funding toward optometry school.

• The National Optometric Foundation and the NOA created a new scholarship to honor the life of the first African American Male HBCU Visioning the Future awardee Nijewel Holiday. The NOA awarded two African American males the Nijewel Xavier Holiday HBCU Memorial Scholarship for demonstrating their focused commitment to the optometric profession just as Nijewel did.

• The NOA/NOSA held the fifth series of NOSA Town Hall discussions during Black History Month on race, diversity and equity. One hundred students, administrators, doctors of optometry and corporate partners joined the conversation on moving diversity, equity and inclusion forward.

• The National Optometric Association leadership hosted the National Optometric Leadership conference, which engaged in essential topics with the leaders of ARBO, AOA, Academy, ASCO, NBEO, deans and presidents.

• The NOA created its first Dean of the Year award and awarded it to the dean of The Ohio State University, Dr. Karla Zadnik, for her continuous support of the NOA’s mission. Dean Zadnik has paid more than 30 faculty and staff NOA memberships for the past three years.

• The National Optometric Association continues collaborating with other professional organizations (such as the Vision Council, the North Carolina Optometric Association, Prevent Blindness, the Essilor Vision Foundation and the National Eye Health Education Program) to help promote wellness.
"Advancing the Visual Health of Minority Populations"

- Corporate support continues to increase with significant visibility and presence at the annual conventions.
- NOA completed its first diversity, equity and inclusion CE course during our 2023 CE program in Fort Lauderdale.

The NOA is planning its annual convention in Philadelphia, Pennsylvania, for 2024. Our theme for 2024 is "For the Love of Vision." We will provide 16 hours of continuing education, networking and social events, award ceremonies and scholarships. We anticipate an audience of 275 composed of doctors of optometry, students, allied health professionals and corporate partners.

Please visit the website to learn more about the NOA, annual events, highlights and accomplishments at www.nationaloptometricassociation.com.
OEPF’s mission is to encourage research into human vision and the visual process, provide education necessary for the discipline of optometry to emerge as an independent profession worldwide, develop a cadre of willing and able leaders for the continued support of optometry, provide access to instruments, equipment, publications and materials supportive of the discipline of optometry related to the educational mission of the foundation and educate the public and the professions about the importance of visual health and hygiene, the prevention of visual and ocular problems, an understanding of visual development, visual rehabilitation and the enhancement of vision and the visual process.
In our 96th year of providing education and optometric publications, we pride ourselves with having an increasing number of total enrollment of students and residents in OEPF; participants include optometrists, vision therapists, students and ophthalmologists, with faculty and other optometric professionals from all over the world.

2023 for OEPF meant expansion with new courses, publications and eBooks as well as a distinguished library of 200-plus CE webinars. At OEPF, we have continued to adapt to the new reality and welcomed and reached out to the global optometric community with our virtual and hybrid meetings.

Overall, the post-Covid-19 years have shone a spotlight on some great new opportunities.

**Leadership (as of September 2023)**

Chair: Eric Hussey, O.D. | Spokane, Washington, USA  
Vice Chair and Secretary: Pamela Schnell, O.D. | Memphis, Tennessee, USA  
Treasurer: Cathy Stern, O.D. | Canton, Massachusetts, USA  
Director/Trustee: Brad Habermehl, O.D. | Pomona, California, USA  
Director/Trustee: Fred Brecheen, O.D. | San Antonio, Texas, USA  
CEO-Executive Director: Line Vreven

**Education and Certification**

We are thrilled to announce that after almost 100 years OEPF in early 2023 launched its certification program of having the privilege of providing post-graduate education on behavioral neuro-optometry. We now offer you the option to become a fully certified behavioral neuro-optometrist and add the professional designation of COEP behind your name, or a fully certified behavioral vision therapist and add the professional designation of COEP-T behind your name. For more information: [https://www.oepf.org/certification/](https://www.oepf.org/certification/).

Prerequisite to becoming OEPF-certified as an optometrist is to have completed all four OEPF Clinical Curriculum Courses. This certification process is an online process with a peer-reviewed number of questions on all four Clinical Curriculum Courses. You must score a minimum of 80% on the questions to succeed in this certification. The system allows you to retake the quizzes one time should you fail the first time without having to re-submit your application.

The OEPF Core Clinical Curriculum is a four-part series of courses totaling 133 hours of CE and is currently offered over the internet and in person. Clinical Seminars and other lectures, regional conferences and workshops have also shifted online, allowing for a wide global participation. More information: [https://www.oepf.org/clinical-curriculum-2/](https://www.oepf.org/clinical-curriculum-2/).
OEPF holds courses on a great variety of topics and research ranging from neuro-optometry to courses on TBI (acquired brain injury/traumatic brain injury), pediatric vision, vision therapy, reflex foundations, practice management, etc., as well as a huge library of CE webinars: https://www.oepf.org/webinars/

Information on the education program: https://www.oepf.org/calendar/

Publications and web shop

The Foundation continues to publish our international peer-reviewed journal, *Optometry & Visual Performance (OVP)*. The journal is available in online format which has increased readership and authorship tremendously. The journal is now read regularly in over 60 countries worldwide. Archived issues can be accessed at www.oepf.org. The editor-in chief is Dr. Marc Taub from Southern College of Optometry and the managing editor is Dr. Pamela Schnell, also from Southern College of Optometry. The review board is comprised of colleagues from around the world in various practice settings and universities.

The OEPF continues to publish multiple titles each year.

The newest published titles are:

- “From Fracture to Function: Clinical Insights into the Visual Aspects of Acquired Brain Injury” by Marc Taub as editor.
- “Vision The Forgotten Sense” by Ken Lane.
- “Applied Concepts in Vision Therapy 2.0” by Len Press, Marc Taub and Pamela Schnell as editors.
- “The Essential Playbook” by Nancy Torgerson and Kristi Jensen.
- “Indicators of Primitive and Postural Reflexes Assessment (IPPR)” by Patti Andrich.
  - The latter two books are our first “hybrid” books.
- Reprint of “Visual Training Preliminary Considerations Part 1” by Frederick Brock.
- Rewrite of “Reflexes, Movement, Learning & Behaviour” by Sally Blythe.

Most books are now available as eBooks as well.

OEPF represents more than 200 different authors and products through its web shop. For more information: www.oepf.org/shop in the fields of general optometry, clinical vision care, research into human vision and the visual process.
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Report from:
The College of Optometrists in Vision Development (COVD) d/b/a Optometric Vision Development and Rehabilitation Association (OVDRA)

The College of Optometrists in Vision Development (COVD) is an organization growing in size and influence and with a new trade name: Optometric Vision Development and Rehabilitation Association (OVDRA). We are an international membership organization and certification body dedicated to the advancement of developmental and behavioral vision care. Our mission is: Improving lives by advancing excellence in developmental and rehabilitative neuro-optometric vision care through education and board certification.

Members of the association include optometrists, vision therapists, optometry students, faculty and vision science researchers. There are currently 2,500 members, with over 800 student and resident members and more than 400 international members.

Leadership

Just a few weeks ago in April of 2024 at the 53rd Annual Meeting, the executive committee of the board of directors for 2024-2025 was installed:

- Immediate Past President: Jennifer Dattolo, O.D., FCOVD
- President: Marie Bodack, O.D., FCOVD
- President-Elect: Patrick Quaid, O.D., FCOVD
- Secretary/Treasurer: Jennifer Smith Zolman, O.D., FCOVD

The following members serving as directors on the board were also officially installed:

- Curtis Baxstrom, O.D., FCOVD
- Phillip Bugaiski, O.D., FCOVD
- Stacey Coulter, O.D., FCOVD
- Robert Fox, O.D., FCOVD

Board Certification

Since 1971, COVD has provided a fellowship process leading to board certification in vision development and vision therapy. The International Examination and Certification Board (IECB), confers the certification. Attainment of fellowship provides the public and other health care
professionals a means of identifying optometrists who have demonstrated advanced competency in developmental and rehabilitative vision care. In April of 2024, we welcomed 32 new Fellows and 33 new Certified Optometric Vision Therapists. The certification process provides an opportunity for optometric vision therapists to expand their knowledge and skill in providing vision care as related to development and behavior in optometric vision therapy.

**Academic Services**

The Board of Directors is having another successful year reaching out to optometry students, residents, faculty and administrators through our “Tour de Optometry” program. All U.S. and Canadian schools and colleges of optometry are visited by a member of the board or a past president each academic year.

In its 23rd year, the tour continues to be one of the most successful outreach efforts undertaken by COVD. This year, we have seen the return to in person visits! During the “Tour” program materials are distributed and presentations made about the organization itself, practice management to assist in a career in this field, and cases and research in developmental and rehabilitative optometry. In addition, visits with administration and faculty are arranged to discuss their needs and how we can help advance student education in developmental, behavioral and rehabilitative vision care. Thanks to a donation from the Kaplan estate in 2015, we were able to establish the Kaplan Speakers Bureau Fund to enhance our optometry school outreach program. The money in this fund is used for additional visits by Fellows to the optometry schools or for optometry students to visit the offices of Fellows; we have had several schools use their Kaplan funds this year with a few more scheduled for the spring!

**Chapters**

Our three current chapters, COVD South Korea, COVD Canada and COVD Israel continue to add new members and find ways to bring education to their constituents in the face of travel restrictions. Each chapter also continues to develop its members into the eligibility pipelines for our certification process enhancing the number of international Fellows and certified professionals.

**Journal**

Vision Development & Rehabilitation (VDR) began its 10th year in 2024. The mission of the journal is to create the premier scientific journal in vision development, vision therapy and rehabilitative optometry. We continue building a larger database of content with a renewed focus on getting reviewers to participate but also to increase the knowledge and confidence in those to become writers. Our inaugural issue for the 10th year features the 2024 accepted posters! Preview them in the journal and meet with the authors and creators on-site in the exhibit hall.

**Education**

COVD provides an extensive educational program at its annual meeting held in April. A special series of curated two-day in-depth courses based on foundational needs and advanced practice gaps gives optometrists and their staff the opportunity to gain a solid background in the application of vision
therapy. The annual meeting general education program that follows brings in speakers to enhance interdisciplinary understanding and communication, researchers whose work guides clinical care, and optometrists who make this research clinically applicable.

Our meeting in 2023, held in Toronto, Ontario, Canada was a successful venture into our first Canadian meeting! While international travel was still uncertain, when registration opened due to pandemic-era restrictions, we landed with a cumulative attendance of 777 attendees! The 2024 meeting, held in San Francisco, California, just wrapped at the writing of this report with great numbers on-site and positive feedback. In 2023, we also committed to a strategic goal of enhancing offerings to support our certified constituents for their maintenance of certification by offering virtual education. Offering five courses virtually, we had over 350 attendees. Looking ahead, the education committee continues to source virtual education offerings. Be sure to answer our call for speakers posting in the Volunteer Hub if you are interested in presenting virtually through the year. We also look forward to reinvigorating the regional education seminars in 2024. Optometrists seeking to begin or expand care for infants and children in their practices or to offer optometric vision therapy will find the COVD annual meeting and our other CE courses an excellent source for expanding their knowledge in these areas. All are invited to attend the 54th annual meeting in Fort Worth, Texas, in April of 2025!

Respectfully submitted,

Marie I. Bodack
President
College of Optometrists in Vision Development (COVD) d/b/a Optometric Vision Development and Rehabilitation Association (OVDRA)
SECO International is comprised of 13 state optometric associations and seven associate international organizations. SECO continues to enhance its presence both nationally and internationally. SECO continuously seeks to produce the best continuing education event in optometry and advance the profession of optometry worldwide.

SECO 2024 Congress

This year’s annual Congress served as the source for high-level collaboration and networking, propelling our shared mission to provide leading continuing education worldwide and to advance the profession forward. SECO consistently seeks to attract the most outstanding talents in the field to share their insights at our events, and this year was no different. A few highlights included:

- Expansion of hands-on workshops and Facilitated Learning Labs, for optometrists, paraoptometrics/technicians, and opticians.
- Expanded symposium sessions, providing attendees with a multitude of meal options throughout the Congress.
- The social events included a new Friday night networking party following the popular Alumni Receptions, in addition to the Saturday Night Party.
- A new Student Representative Committee, new Student Travel Grants, and updated networking event were added to the lineup this year.
- The return of the complimentary NAO member CE registration for Opticians and Allied Healthcare Professionals and NAO Pavilion in the exhibit hall.
- The return of our successful Certificate Programs, which will be also available via SECO University.
- The Contact Lens Summit program included an update on the latest innovations in contact lenses and ways to enhance patient satisfaction.
- MedPRO360, our unique business conference within the SECO conference, continues to be a cornerstone for advancing leadership and management strategies in the eye care industry. This comprehensive program offers invaluable resources, knowledge, and strategies to navigate the ever-changing business landscape of eye care successfully. With a diverse range of topics, including effective financial management, patient attraction and retention, and enhancing sales and profitability.
- Over 100 poster presenters participated this year.
• SECO’s exhibit hall, Optometry’s Marketplace is an essential component of the Congress offering the latest products and technology from the optometric industry, free education, events, and more. This year, SECO’s Optometry’s Marketplace featured:
  • The VIEW luxury eyewear pavilion
  • The NAO Pavilion, a hub for education opportunities and networking designed to enhance the skill sets and knowledge of Opticians at all experience levels allowing attendees hands-on learning and education sessions.
  • The Surgical Skills Pavilion, developed in partnership with the American Society of Optometric Surgeons, is a dedicated pavilion featuring hands-on experiences designed to familiarize or update attendees with a variety of surgical, laser, and aesthetic procedures.
• The SECO 2024 Award Winners include:
  o President’s Award – Dr. Ron Foreman, OD (FL)
  o Distinguished Service Award – Dr. Joel Byars, OD (GA)
  o Optometrist of the South - Dr. Selina R. McGee, OD, FAAO (OK)
  o Young OD of the South – Dr. Christian Wyler, OD (KY)
  o Optician of the South – Diane F. Drake, LDO, ABOM, NCLEM, FNAO (GA)
  o Para Optometric of the South – Savanna Johnson, CPOA (MS)
  o Executive Director of the Year Award – Mr. Bryan Markowitz (GA)
• SECO 2025 is scheduled for February 26th – March 2nd in Atlanta, Georgia.

SECO Students and Residents
• SECO 2024 rolled out a new Student Representative Committee comprising the following individuals:
  NOVA Azalia Roach
  NSUOCO Nicholas Rankin
  KYCO Jenna Gardner
  SCO Kyle Garner
  UAB Cheyann Kazemian
• New student Travel Grants - $250 student travel grants were offered to all five optometry schools located in SECO member states, sponsored in part by VSP Premier Edge™ Training and Education.
• SECO 2024 featured a new networking event, Futures in Focus Happy Hour bringing together students, residents, and practicing optometrists representing diverse specialties.
• Congratulations to our 2023 Clinical Excellence Award Winners:
  NOVA Anushka Mistry
  NSUOK Taylor Vincent
  KYCO Caitlynn Joy Estevez
  SCO Sarah Thrower
  UAB Heidi Hernandez
SECO University

SECO University provides optometrists and Allied Healthcare Professionals with outstanding educational opportunities in an online environment to meet the needs and requirements of the profession. In partnership with the National Academy of Opticianry, four (4) six-hour programs were hosted via SECO University in 2023.

SECO Tech Talks were launched via SECO University in 2023. Several Tuesday evening sessions were held, hosted by Dr. Walt Mayo and Dr. Adam Parker. These events were designed for OD’s who value open conversations and an opportunity to learn from each other’s experiences, challenges, and successes. Far from being a one-way flow of information, attendees were encouraged to participate, voicing their experiences as well as posing questions for the group to help everyone learn about this exciting, quickly expanding area of technology.

SECO Leadership

- From West Virginia, Dr. Brad Lane was sworn in as the new SECO Secretary, and Dr. Horace Deal from the state of Georgia became the new President of SECO.

2024 – 2025 Executive Committee

The Executive Committee comprises the following individuals:

- Horace Deal, OD – President
- Matt Burchett, OD - Treasurer
- Tim Barry, OD – President Elect
- Brad Lane, OD – Secretary
- Dave Rouse, OD – Vice President
- Michelle Cooper, OD – Past President

2023 – 2024 Board of Trustees

The Board currently comprises the following individuals:

- Howard Day, OD (AL)
- Patricia Flippin-Westfall, OD (AR)
- Bryan Stam, OD (FL)
- Ben Casella, OD (GA)
- TeShawna Sutton, OD (KY)
- Kevin Kasovich, OD (LA)
- Mike Weedon, OD (MS)
- Michael Haines, OD (NC)
- Michelle Welch, OD (OK)
- Lori Roberts-Hauser, OD (SC)
- Patricia Walker, OD (TN)
- Joe Droter, OD (VA)
- Shawn Sammons, OD (WV)
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Report from VOSH/International

VOSH/International believes in the freedom to see. We provide the gift of vision and quality eye health to people who can neither afford nor obtain such care across the world by facilitating the sustainability of vision care provision through supporting sustainable eye clinics, optometry schools, and optometric educators in places lacking sufficient eye care.

The global scope of our humanitarian activity
VOSH/International is the biggest network of volunteer optometrists in the world. By the end of 2023, we had 106 chapters affiliated (49% from the USA, 51% international chapters). All VOSH chapters offer free optometric services to over 150,000 patients annually in under-served areas in more than 32 countries worldwide. After the COVID-19 pandemic, US and Canadian chapters progressively resumed international humanitarian work. Since 2018 our membership has experienced a 41% growth. We are humbled by the interest in our work.

Sharing expertise in support of global optometric education
Quality optometric education is the cornerstone of sustainability. VOSH supports 43 international schools of optometry across 4 regions of the world. In 2023, VOSH/International focused efforts on:

- Implementing teaching clinics where US VOSH chapters work together with local schools of optometry to facilitate knowledge and clinical skills sharing plus develop cultural competency skills while serving patients. We supported teaching clinics with schools of optometry in Guatemala, Mexico, Kenya, and Haiti. The latter is of special importance as graduating students had very limited clinical practice with patients. We are indebted to VOSH-PA for their leadership with this special project.
- Support international schools of optometry with US-trained lecturers for short periods (Ambassadors’ Program). The schools MMUST, Kenya, and KNUST, Ghana benefited this year.
- Foster relationships and mutual learning between US SVOSH chapters with their international counterparts under our Mentorship Program. SVOSH-ICO and Universidad de los Andes, Peru were supported.
- A pilot to support the improvement of optometric education by engaging the expert advice of SVOSH-FunAndina-Colombia to support SVOSH-Eurohispano-Peru as part of our South-South Exchange Project and supporting the SVOSH-Makerere-Uganda with a fellowship grant to send a young optometrist for post graduate studies in India. Unfortunately, the visa was not granted. This is part of the new VOSH-Corps Program.
- Our Education Committee selected SVOSH chapters in Ghana, Jordan, Colombia, and Nigeria to carry out research contributing to the understanding of the situation of eye health and vision in those countries.
- For a second year we collaborated with the ASCO-SIG-IOE and held an online COPE-accredited course and a joint meeting at the time of the AAO in New Orleans. We have a joint working group to work on initiatives of common interest.
- Our Annual Meeting “Transforming access through technology and innovation” offered a half-day hybrid meeting featuring the expertise of our members and partners to almost 300 participants in person and online. We continued offering COPE-accredited education via our Zoom platform.
• The research project on children’s vision and learning implemented by our SVOSH-UNAN chapter in Nicaragua continued under the mentorship of members of our School Screenings Working Group.
• Our Technology Transfer Program (TTP) supported international schools of optometry and public hospitals with donated optometric equipment in Haiti, Panama, Mexico, Vietnam, Jordan, Ghana, Kenya and Nicaragua.

Making our strategic partnerships work
VOSH/International is an active member of the International Agency for the Prevention of Blindness (IAPB) providing inputs into its refractive error, low vision, and gender working groups, and of the World Council of Optometry (WCO). We signed an MoU with the Latin American Association of Optometry and Optics (ALDOO) to increase our impact in this region. In the US, we are delighted to have the participation of the AOA representative in our monthly Board meetings and AOA’s support for our midyear meeting. As mentioned before our growing relationship with ASCO-SIG-IOE is very strategic for our educational work.

Diverse and inclusive
We work to address inequalities of access. This also involves representation in our decision-making structures. We have two Board members from Latin America and a Latin American Advisory Committee to provide feedback and identify the needs of the region. Our 16 Board members are 94% ODs (6 female, 10 male).

Communicating and sharing information
Our monthly newsletter reaches over 1500 subscribers. It features key information on public health and international development to educate and raise awareness, whenever possible in Spanish and French. Our social media and website play an important role in disseminating information.

Respectfully submitted.

Maria Arce-Moreira
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2024 House of Delegates

Report from the World Council of Optometry

‘Our vision is of a world where optometry makes high quality eye health and vision care accessible to all people.’

The World Council of Optometry (WCO) is an international membership-based organization including regional and national optometry organizations, optometry schools, individual optometrists, and industry professionals.

We are pleased to have the continued support of the AOA as we facilitate the development of optometry around the world and support optometrists in promoting eye health and vision care as a human right through advocacy, education, policy development and humanitarian outreach.

While you may read about the activities of WCO below, we are thrilled to be working with AOA in preparation for our next Congress (WCO5) in collaboration with Optometry’s Meeting® in 2025 in Minneapolis! We hope to see you there.

Over the past year, WCO has been actively engaged in so many ways to serve our members. I would like to highlight the most important shift for us as an organization. Under the leadership of Past President Prof. Peter Hendicott and former Managing Director Dr. Susan Cooper, WCO has reviewed our organizational structure and with the input and support of our membership and Board of Directors, we have emerged from 2023 as a more streamlined organization more focused on our mission. The new governance program allows us to more efficiently address global issues with the input of all stakeholders.

On the global level, WCO has been actively engaged as the only optometric organization that has official relations with the World Health Organization (WHO). We have been participating in the conversations on the new programs WHO is initiating to address uncorrected refractive error. In addition, WCO volunteers continue to represent the profession at the International Agency for the Prevention of Blindness as they look to ensure eye health is addressed, including participating in World Sight Day activities.

Our committees have been busy developing programs that serve our current and future members including the launch of the Pediatric Resource, highlighting myopia, dry eye and presbyopia, and the continuing efforts to refine the toolkits for countries looking to advocate for the profession.

Most recently, WCO has released a new Competency Framework for Optometry. Developed by the WCO Education Committee, this document highlights the competencies required for optometry to participate most effectively in the international eye care agenda.

We ended the year with the Fourth World Congress of Optometry in Melbourne, Australia. We would like to thank our partners for that event, Optometry Victoria South Australia and the Optical Distributors and Manufacturers Association, as well as all of the WCO volunteers and other attendees who worked so
diligently to make the event so successful. Together, we welcomed more than 3,500 attendees and were able to present our awards:

- Dr. Scott Mundle, recipient of the WCO Distinguished Service Award in Memory of Dr. Uduak Udom
- Dr. Sajeesh Kumar Kamala Raghavan, recipient of the WCO International Optometrist Award
- Dr. Ameer Abou Adela, recipient of the Young Leader Award in Memory of Dr. Paul Berman

Additionally, Dr. Priya Morjaria presented the first Memorial Lecture in Honor of Ms. Karen Sparrow.

Hosted by WCO President Prof. Peter Hendicott and WCO President-Elect Dr. Sandy Block, and generously supported by EssilorLuxottica, WCO's 2023 President’s Forum was an invitation-only event to provide a platform wherein practicing clinicians, educators and corporate representatives came together to discuss the current development of optometry and the desired impact in the broader health agenda across the world. This event has been held at each of the WCO World Congresses. This year, the theme of the forum was “Optometry’s Role in Global Health Care.” The forum encouraged all attendees to think about how they can contribute to making eye care more accessible, equitable, affordable and effective, both now and in the future.

Beyond our bi-annual congress, examples of WCO programming include:

**Optometry Program in Advocacy and Leadership (OPAL) — offered annually**

The WCO Advocacy and Leadership course, Looking Towards the Future: Optometry Program in Advocacy and Leadership (OPAL), enables future eye health leaders to use advocacy and leadership strategies to effect change at the policy and practice levels. The goals of this course are to equip the course participants with knowledge and skills to lead the profession forward through advocacy, public health initiatives, and leadership within the health care sector while at the same time supporting the WCO strategic plan.

**Grants**

The WCO Grant Program is intended to support the vision and mission of WCO by funding projects and initiatives that lead to the advancement of the role of optometry and its participation in eye and vision care within health care systems. It is supported by the WCO charitable arm: World Optometry Foundation. There are two types of grants offered: the General Grant and Education Mentor Grant.

**There are many more activities listed on our website at [worldoptometry.org](http://worldoptometry.org)**

**Membership**

With memberships for both optometric organizations and individuals, WCO reflects a global community of those who are willing to support WCO in facilitating the development of global optometry and promoting eye health and vision care as a human right. To learn more, go to [worldoptometry.org/join-us/](http://worldoptometry.org/join-us/)

**THANK YOU to the AOA**

Thank you to the AOA for generously housing the WCO in your WCO St. Louis office! WCO is made to feel very welcome, and your in-kind contribution is truly appreciated.