

REPORT OF THE BOARD OF TRUSTEES

B of T Report 04-JUN-2021

Subject: Update on Corporate Relationships

Presented by: Russ Kridel, MD, Chair

1 PURPOSE

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3 The purpose of this informational report is to update the House of Delegates (HOD) on the results of
4 the Corporate Review process from January 1 through December 31, 2020. Corporate activities that
5 associate the American Medical Association (AMA) name or logo with a company, non-Federation
6 association or foundation, or include commercial support, currently undergo review and
7 recommendations by the Corporate Review Team (CRT) (Appendix A).

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9 BACKGROUND

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11 At the 2002 Annual Meeting, the HOD approved revised principles to govern the American Medical
12 Association's (AMA) corporate relationships, HOD Policy G-630.040 "Principles on Corporate
13 Relationships." These guidelines for American Medical Association corporate relationships were
14 incorporated into the corporate review process, are reviewed regularly, and were reaffirmed at the
15 2012 Annual Meeting. AMA managers are responsible for reviewing AMA projects to ensure they
16 fit within these guidelines.

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18 YEAR 2020 RESULTS

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20 In 2020, 64 new activities were considered and approved through the Corporate Review process. Of
21 the 64 projects recommended for approval, 31 were conferences or events, nine were educational
22 content or grants, 20 were collaborations or affiliations, two were member programs, one was an
23 American Medical Association Foundation (AMAF) program and one was an AMA Innovations,
24 Inc. program (Appendix B).

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26 CONCLUSION

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28 The Board of Trustees (BOT) continues to evaluate the CRT review process to balance risk
29 assessment with the need for external collaborations that advance the AMA's strategic focus.

Appendix A

CORPORATE REVIEW PROCESS OVERVIEW

The Corporate Review Team (CRT) includes senior managers from the following areas: Strategy, Finance, Health Solutions Group (HSG), Advocacy, Federation Relations, Office of the General Counsel, Medical Education, Publishing, Ethics, Enterprise Communications (EC), Marketing and Member Experience (MMX), Center for Health Equity, and Health and Science.

The CRT evaluates each project submitted to determine fit or conflict with AMA Corporate Guidelines, covering:

- Type, purpose and duration of the activity;
- Audience;
- Company, association, foundation, or academic institution involved (due diligence reviewed);
- Source of external funding;
- Use of the AMA logo;
- Editorial control/copyright;
- Exclusive or non-exclusive nature of the arrangement;
- Status of single and multiple supporters; and
- Risk assessment for AMA.

The CRT reviews and makes recommendations regarding the following types of activities that utilize AMA name and logo:

- Industry-supported web, print, or conference projects directed to physicians or patients that do not adhere to Accreditation Council for Continuing Medical Education (ACCME) Standards and Essentials.
- AMA sponsorship of external events.
- Independent and company-sponsored foundation supported projects.
- AMA licensing and publishing programs. (These corporate arrangements involve licensing AMA products or information to corporate or non-profit entities in exchange for a royalty and involve the use of AMA's name, logo, and trademarks. This does not include database or Current Procedural Terminology (CPT ®) licensing.)
- Member programs such as new affinity or insurance programs and member benefits.
- Third-party relationships such as joint ventures, business partnerships, or co-branding programs directed to members.
- Non-profit association collaborations outside the Federation. The CRT reviews all non-profit association projects (Federation or non-Federation) that involve corporate sponsorship.
- Collaboration with academic institutions only if there is corporate sponsorship.

For the above specified activities, if the CRT recommends approval, the project proceeds.

In addition to CRT review, the Executive Committee of the Board must review and approve CRT recommendations for the following AMA activities:

- Any activity directed to the public with external funding.
- Single-sponsor activities that do not meet ACCME Standards and Essentials.
- Activities involving risk of substantial financial penalties for cancellation.
- Upon request of a dissenting member of the CRT.
- Any other activity upon request of the CRT.

All Corporate Review recommendations are summarized annually for information to the Board of Trustees (BOT). The BOT informs the HOD of all corporate arrangements at the Annual Meeting.

Appendix B

SUMMARY OF CORPORATE REVIEW
RECOMMENDATIONS FOR 2020

<u>Project No.</u>	<u>Project Description</u>	<u>Corporations</u>	<u>Approval Date</u>
CONFERENCES/EVENTS			
4648	Poynter Institute Webinar – Sponsorship with AMA name and logo.	Poynter Institute	12/1/2020
4694	National Press Club Webinar – COVID-19 vaccine focused webinar sponsorship with AMA name and logo.	National Press Club	12/2/2020
4907	American Bar Association (ABA) Opioid Summit – Sponsorship with AMA name and logo.	American Bar Association (ABA)	12/16/2020
27981	Alliance for Health Policy Post Election Symposium – Updated virtual sponsorship with AMA name and logo.	Alliance for Health Policy	10/5/2020
35268	AMA/American Health Information Management Association (AHIMA) Outpatient Clinical Documentation Improvement (CDI) Workshop – Co-branding event with AMA name and logo.	American Health Information Management Association (AHIMA)	8/31/2020
36280	2021 National Rx Drug Abuse & Heroin Summit Update – Repeat support of event with AMA name and logo.	University of Kentucky, Northern Kentucky University Deterra Drug Deactivation System	10/7/2020
37286	Women Business Leaders Annual Sponsorship 2020 – Sponsorship with AMA name and logo.	Women Business Leaders (WBL) Amgen, Inc. McKesson Corporation MCG (Milliman Care Guidelines) Hearst Health Tivity Health	6/16/2020
37366	National Lesbian and Gay Journalist Association – Convention sponsorship with AMA name and logo.	National Lesbian and Gay Journalist Association (NLGJA)	2/4/2020

37455	Bellin Health Team-Based Care Training Camp – Sponsorship with AMA name and logo.	Bellin Health Systems	2/14/2020
37486	HCA Healthcare Event Collaboration – Updated collaboration with HCA for residents with AMA name and logo use.	HCA (Hospital Corporation of America) Healthcare	2/19/2020
37467	Erie Neighborhood House 150th Anniversary Dinner Celebrating Inclusion – Sponsorship with AMA name and logo.	Erie Neighborhood House	2/14/2020
37487	Fenway Institute's Conference on Minority Health – Sponsorship with AMA name and logo.	Fenway Health Harvard Medical Massachusetts Medical Society's LGBTQ Issues Committee	2/19/2020
37515	HIMSS Health 2.0 Kingdom of Saudi Arabia Conference and Exhibition 2020 Sponsorship – Sponsorship with AMA name and logo for Health Solutions products.	Healthcare Information and Management Systems Society, Inc. (HIMSS) Adaptive Tech Soft Epic Systems Inter Systems NOMD Holding Company Oasis Vocera Communications Ideal Middle East Sapphire Health Management System (HMS) Elsevier	2/24/2020
37561	National Association of Black Journalist 2020 Convention – Sponsorship with AMA name and logo.	National Association of Black Journalists (NABJ) National Association of Hispanic Journalists (NAHJ)	3/4/2020
37597	2020 Joy in Medicine CEO Consortium Summit – Sponsorship with AMA name and logo.	Stanford University School of Medicine ChristianaCare	3/13/2020
37686	Howard Brown Health - Midwest LGBTQ Health Symposium 2020 and Webinar – Sponsorship with AMA name and logo.	Howard Brown Health ConsejoSano	6/15/2020

37980	NAMSS Town Hall Webinar Sponsorship – Repeat sponsorship with AMA name and logo use.	National Association of Medical Staff Services (NAMSS)	4/22/2020
38013	National Medical Fellowships' Champions of Health Awards 2020 – Sponsorship with AMA name and logo.	National Medical Fellowships (NMF)	4/29/2020
38181	AHIP Online Institute and Expo Sponsorship – Repeat sponsorship with AMA name and logo use.	America's Health Insurance Plans (AHIP) 3M (formerly Minnesota Mining and Manufacturing Company) Accenture Amwell (American Well)	5/29/2020
38245	American Telemedicine Association 2020 Sponsorship – Sponsorship with AMA name and logo for annual conference of telehealth providers.	American Telemedicine Association (ATA) Bayesian Health Amwell (American Well) Ziegler InTouch Health	6/9/2020
38299	Rush University Medical Center - 2020 Virtual West Side Walk for Wellness – Repeat sponsorship with AMA name and logo.	Rush University Medical Center (RUMC)	6/23/2020
38379	Structural Racism in Health Professions Education: Curriculum, Structural Competency, and Institutional Change – AMA name and logo use for webinar collaboration.	Beyond Flexner Alliance (BFA)	7/10/2020
38468	American Academy of Professional Coders Healthcon Regional Conference 2020 – Sponsorship with AMA name and logo.	American Academy of Professional Coders (AAPC)	7/28/2020
38536	Women Leaders in Healthcare Conference – Sponsorship with AMA name and logo of virtual booth and program.	Modern Healthcare Furst Group NuBrick Partners Keck Medicine of USC (University of Southern California) TeamHealth HARTZ Search GetixHealth University of Alabama at Birmingham (UAB)	7/31/2020

38783	Rock Health Summit – Repeat sponsorship with AMA name and logo of digital health conference.	Rock Health Vynyl Accenture Fenwick & West LLP J.P. (John Pierpont) Morgan Chase & Co.	9/9/2020
38819	NAMSS 44th Educational Virtual Conference & Exhibition – Repeat sponsorship with AMA name and logo.	National Association Medical Staff Services (NAMSS) SkillSurvey Verity Stream MD-Staff (Applied Statistics & Management, Inc.) Verge Health	9/15/2020
38853	AHIMA 2020 Conference and Assembly on Education – Repeat sponsorship with AMA name and logo.	American Health Information Management Association (AHIMA)	9/30/2020
39137	AHIP Consumer Experience and Digital Health Forum Sponsorship – Sponsorship with AMA name and logo. Managing Your Health and Wellness in the Era of COVID-19 – AMA name and logo use at World Health Day. Healthcare Administration Alliance's (HAA) Conference – AMA's Health Solutions participation with name and logo use. Consumer Privacy Framework for Health Data – Framework and webinar with AMA name and logo association with these organizations.	America's Health Insurance Plans (AHIP) 3M (formerly Minnesota Mining and Manufacturing Company) Accenture Amwell (previously known as American Well) Livongo Health Inc. HLTH, LLC American Diabetes Association (ADA) American Heart Association (AHA) Healthcare Administration Alliance (HAA) eHI (Enable Healthcare, Inc.) Center for Democracy Technology (CDT) Robert Wood Johnson Foundation 23andMe American College of Physicians Ancestry AI Now Institute American Cancer Society American Hospital Association Ascension Change Healthcare Children's National Hospital Ciitizen Corporation CVS (Consumer Value Stores) Health	11/6/2020 4/7/2020 9/15/2020 8/25/2020

Datavant
Electronic Frontier Foundation
Elektra Labs
Evidation
Fitbit, Inc.
Future of Privacy Forum
Georgetown Institute for Technology
Law and Policy
Google LLC
GW (George Washington University)
School of Medicine
Hispanic Technology and Telecom
Partnership
Hogan Lovells
Marshfield Clinic Health System
Microsoft
National Partnership for Women &
Families
New America's Open Technology
Institute
Pew Charitable Trusts
Salesforce
Teladoc Health
Under Armour
University of Nebraska Governance
and Technology Center
Waldo Law Offices
Wellmark Blue Cross and Blue Shield
Yale University

EDUCATIONAL CONTENT OR GRANTS

36512	Collaboration with LuCa (Lung Cancer) National Training Network – The Education Center to host "Lung Cancer and the Primary Care Provider" educational module. AMA name and logo use on program materials.	LuCa (Lung Cancer) National Training Network University of Louisville School of Medicine Bristol-Myers Squibb (BMS) Foundation Cancer Care™ Initiative	1/27/2020
37287	AMA Mini Z Well-Being Survey – Technology solution survey with AMA name and logo.	Hennepin Healthcare System, Inc. Hennepin County Medical Center (HCMC)	1/23/2020
37566	Edge-U-Cate Credentialing School/Certification Study Program – Sponsorship with AMA name and logo.	Edge-U-Cate LLC ABMS Solutions/Certi-FACTS American Osteopathic Information Association (AOIA) Elsevier	3/3/2020

37718	Center for Health Equity Curriculum and Content Development with Health Begins – A content development agreement with AMA name and logo.	HealthBegins, LLC	3/20/2020
37973	MAVEN Project including Volunteers in Medicine for COVID-19 Emergency Workforce Augmentation – This guide includes resources to aid health care workforce volunteer process around credential verification.	MAVEN (Medical Alumni Volunteer Expert Network) Project Volunteers in Medicine (VIM)	4/21/2020
38479	Collaboration with Alzheimer's Association – AMA name and logo use to announce collaboration for free online educational modules.	Alzheimer's Association (AA) MetLife Foundation	7/28/2020
38582	CPT® E/M 2021 – Content Development Initiative – Collaboration to develop educational content with AMA name and logo for branding.	Nordic Consulting Partners, Inc.	8/12/2020
38583	Collaboration with Stanford Center for Continuing Medical Education – Hosting set of free online educational modules with AMA name and logo. Morehouse School of Medicine Book Quote – AMA Board member quote for “The Morehouse Model – How one school of medicine revolutionized community medicine and health equity” book.	Stanford University Stanford Center for Continuing Medical Education Pfizer, Inc. Morehouse School of Medicine ACE (Adverse Childhood Experiences) Consortium	9/24/2020 2/10/2020

COLLABORATIONS/AFFILIATIONS

4753	Cardz for Kidz Sponsorship 2020 – Repeat sponsorship with AMA name and logo for program supporting hospitalized and traumatized children.	Cardz for Kidz!	12/18/2020
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4929	Manatt Health – National policy roadmap focused on the nation’s drug overdose epidemic with AMA name and logo.	Manatt Health	12/15/2020
4958	Ad Council – National communications initiative with use of AMA name and logo, to educate the public and increase the use of the COVID-19 vaccines.	Ad Council (The Advertising Council, Inc.)	12/18/2020
5501	COVID Collaborative – Bipartisan coalition with AMA name and logo, focused on the effective response to COVID-19.	COVID Collaborative	12/23/2020
36397	HL7 Benefactor Membership – Renewal of membership with AMA name and logo.	Health Level Seven International (HL7)	2/4/2020
37393	ESSENCE Campaign to Promote Heart Health – Sponsorship with AMA name and logo in first quarter. Addition of Minority Health Institute (MHI) and WW International Inc. in fourth quarter.	ESSENCE Communications Inc. American Heart Association (AHA) National Medical Association (NMA) Association of Black Cardiologists, Inc., (ABC) Minority Health Institute (MHI) WW International Inc. (formerly Weight Watchers)	10/13/2020
37569	Physician Innovation Network (PIN) and Telehealth Implementation Playbook Collaborators – AMA Physician Innovation Network (PIN) and Telehealth Implementation Playbook collaboration agreements with limited AMA name and logo use.	MD++ R&T IMG Health In Her Hue The Rounds IEEE/EMBS (Engineering in Medicine and Biology Society) National Digital Inclusion Alliance (NDIA) Cambia Grove Xealth Medici OhMD, Inc. University of Louisville Texas Medical Association The Physicians Foundation Creekside Endocrine Associates	8/25/2020
38007	Research Project for High-Performing Physician-Owned Private Practices – Collaboration with AMA name and logo used in final report.	Mathematica	4/28/2020

38040	COVID-19 Healthcare Coalition – Organizational membership and participation in telehealth workgroup and study with AMA name and logo.	COVID-19 Healthcare Coalition	5/4/2020
38168	Hilton COVID Resident Relocation Support – Discounted extended Hilton hotel stay rates for residents featured in the COVID resource guides.	Hilton Worldwide Holdings Inc.	6/2/2020
38169	MAP (Measure, Act, Partner) Dashboards for Health Care Organization (HCO) – The AMA MAP BPTM Dashboard is an evidence-based quality improvement (QI) program providing sustained improvements in blood pressure (BP) control through monthly reports, tracking data and outcome metrics.	Tandem Health (South Carolina)	12/7/2020
38433	COVID-19 Writer's Project – The COVID-19 Writers Project captures a viewpoint from inside a virus's hotspot examining health outcomes that are impacted by socio-economics, education and race. Acknowledgement of AMA's participation with name and logo use.	Brooklyn Community Foundation Pulitzer Center National Geographic BK (Brooklyn) Reader The Original Media Group, LLC	7/18/2020
38662	ASHP Pharmacogenomics Collaboration on Precision Medicine – Co-branding with AMA name and logo for jointly developed programming and content.	American Society of Health-System Pharmacists (ASHP)	8/28/2020
38663	SNOMED Virtual Clinical Terms (CT) Expo 2020 and CPT/SNOMED Demonstration Tool – Sponsorship with AMA name and logo.	SNOMED International SNOMED CT (Clinical Terms) 3M (formerly Minnesota Mining and Manufacturing Company) Clinical Architecture Goldblatt Systems Vidal Group West Coast Informatics	8/31/2020

38777	Improving Health Outcomes (IHO) Self-Measured Blood Pressure (SMBP) Monitoring Pilot – Pilot test for a digital health and remote patient monitoring solution. AMA name and logo on pilot presentations.	MEDITECH (Medical Information Technology, Incorporated) Berkshire Health Systems	10/14/2020
39040	Medical Alley Webinar Series Sponsorship – AMA name and logo association with Minnesota based medical technology community.	Medical Alley Association	10/16/2020
39080	Improving Health Outcomes (IHO) Prevention Strategy Collaboration with Health Care Organizations (HCOs) 2020 – AMA name and logo use alongside these HCOs for prevention of cardiovascular disease and diabetes.	Aledade - Ashley Clinic, KS, Family Care Center, KS, Anne Arundel Medical Center, MD Cone Health Connected Care, LLC, NC University of Mississippi Medical Center, MS Esperanza Health Centers, IL Loyola University Medical Center, IL University of Illinois at Chicago, Department of Medical Education College of Medicine, IL University of North Dakota, NC Mercy, MO Tandem Health, SC Intermountain Healthcare	11/25/2020
39096	Health Equity & Advocacy Leadership Fellowship – Fellowship program collaboration with AMA name and logo.	Morehouse School of Medicine (MSM)	10/27/2020
39541	Women's Wellness through Equity and Leadership Project (WEL 2.0) – Collaboration with AMA name and logo.	American Academy of Pediatrics American Academy of Family Physicians American College of Obstetricians and Gynecologists American College of Physicians American Hospital Association American Medical Association American Medical Women's Association American Psychiatric Association National Hispanic Medical Association National Medical Association Physicians Foundation	11/24/2020

Educational Collaboration with Minority Health Institute / Association of American Medical Colleges – Educational venture with AMA name and logo use.	Association of American Medical Colleges (AAMC) The Minority Health Institute (MHI)	9/3/2020
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MEMBER PROGRAMS

37632	Medical Student Outreach Program (MSOP) 2020 Student Incentives – Membership marketing with AMA name and logo.	Elsevier McGraw-Hill Education Picmonic, Inc SketchyGroup, LLC Ryan Medical Education LLC	3/25/2020
38316	AMA Participation in Project N95 Program – AMA collaboration with Project N95, a not-for-profit Personal Protective Equipment (PPE) clearinghouse, to provide AMA members with access to order quality-certified PPE.	Project N95 American College of Physicians (ACP) American Academy of Family Physicians (AAFP) American College of Emergency Physicians (ACEP) Medical Group Management Association (MGMA) American Medical Group Association (AMGA) American Hospital Association (AHA)	6/29/2020

AMA FOUNDATION

American Medical Association Foundation (AMAF) Corporate Donors 2020 – Corporate donors for 2020.	AbbVie, Inc. Amgen, Inc. Bristol-Myers Squibb (BMS) Eli Lilly and Company Esperion Therapeutics Genentech, Inc. GlaxoSmithKline Merck & Co., Inc. Novartis International AG Pfizer, Inc. Pharmaceutical Research and Manufacturers of America (PhRMA) Sanofi S.A.	11/20/2020
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AMA INNOVATIONS INC.

39438	AMA Innovations Inc. & Onyx Technology – Collaboration to pursue the ACL's Social Care Referrals Challenge grant and associated promotion.	Onyx Technology LLC NewWave Telecom & Technologies	11/30/2020
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