

To: Candidates and Campaign Teams AMA Elections, 2022
From: Bruce A. Scott, MD, Speaker; and Lisa Bohman Egbert, MD, Vice Speaker
RE: Speakers' Communication to J22 Candidates and Campaign Teams

Your Speakers' have received inquiries from various candidates and campaign teams regarding upcoming campaign activities and our recently updated campaign rules. In keeping with our desire to provide transparent and frequent communication with all candidates, we have compiled the following information for all campaigns to review. Please do not hesitate to contact us if questions remain.

Bruce and Lisa

Information for June 2022 Candidates

The following is a narrative with the current plans for the 2022 campaign and elections, as of this date. Please note that as the pandemic continues to evolve and June approaches some changes may occur. We ask for your patience as we navigate the implementation of these new processes and rules in this challenging environment.

After the summary of our plans for the upcoming meeting, we have provided our best interpretation of the rules, as we understand them, in response to the campaign questions we have received. In addition, we have attached a complete updated list of the current election and campaign rules, including the items dealing with complaint reporting, investigation, adjudication, and resolution as recently decided by the BOT after the referral for decision from N21. **We strongly encourage every candidate and campaign team to carefully review the rules and principles**, attached separately.

AMA Candidates Reception

An AMA Candidates Reception will be held on Sunday June 12, 2022 from 5 to 7 pm in the Regency Ballroom of the Hyatt. No other receptions will be allowed at the same time as the AMA Candidates Reception. The theme of the reception will be celebrating the 175th anniversary of our AMA. AMA will plan the event which will include light hors d'oeuvres and a cash bar (as per our regular campaign reception rules). All meeting attendees will be invited. Any candidate may elect to be "featured" at this reception, and all candidates are welcome.

Candidates that want to be "featured" at the AMA Candidates Reception must notify the [HOD Office](#) before **April 18.** Please note that our campaign rules allow for candidates to be featured at only one reception, so candidates that elect to be featured at the AMA Candidates Reception may attend other open receptions but may not be featured (included in a receiving line, candidate poster displayed, or other campaign-identifying material present) at any other reception. Candidates and groups planning to hold separate receptions are encouraged to contact AMA Meeting Services as early as possible to secure space.

Those candidates that elect to be featured at the AMA Candidates Reception are encouraged to provide a poster (no larger than 24x36) with the candidate's name and position sought to be displayed at the entrance of the reception. A photo of the candidate and a listing of endorsements may be included. AMA will supply the easel. There will not be a receiving line.

Featured candidates will be assigned an area within the Regency Ballroom. This assignment will be randomized and a chart of candidate locations will be posted. The amount of space available to each candidate will depend upon the number of candidates electing to be featured at the reception. Candidates and their teams are encouraged to position someone from the team in their area, but candidates and their teams are not required to stay in their assigned area.

Each area will include a table (72 x 30), draped with a white tablecloth, available for the candidate's use. Each candidate may "decorate" or place any items on the table with the following restrictions:

- All items must fit on the table and not protrude beyond the table
- No electricity will be available to the table
- Nothing that is a spill, fall or trip hazard
- No helium balloons
- Must comply with all hotel-imposed restrictions and requirements
- No giveaways, this would include edibles

In addition, candidates may display a second poster (no larger than 24x36) in their assigned area. These posters may include anything the candidate wishes, but no material may extend beyond the borders of the poster. AMA will again supply the easel upon advance request.

Candidates and their campaign team are responsible for setting up before the reception (time to be determined) and for removal of all items at the end of the reception. AMA will fund the general costs of the reception. **All costs associated with the candidate's poster(s) and table decoration are the sole responsibility of the campaign.** In the spirit of the new election rules, candidates are encouraged to minimize expenses.

Candidate Web Pages

AMA will provide the opportunity for each candidate to have a web page on the AMA website. A template is under development and will be shared shortly along with more details and the submission deadline. Candidates will be allowed to customize their individual pages within the template, but other layouts will not be possible. The pages are meant to supplement, not repeat, material from the election manual, but the content is up to the candidate.

The following guidelines will apply:

- Active links are not permitted.
- Videos are not allowed.
- All content is the responsibility of the candidate, but all content is subject to review. For example, copyrighted material not owned by the candidate cannot be posted.

Candidate Email from Office of HOD Affairs

The Office of HOD Affairs will send an electronic communication to all members of the House on behalf of candidates. Candidates are encouraged, but not required to submit materials to be included in the communication. The submitted content from each candidate will be converted to a PDF file and will be attached to the email. The email will be sent from AMA.Elections@ama-assn.org. There will be separate emails for officer and council candidates; however, depending upon the number and size of submissions, multiple emails may be required for each category.

The following guidelines will apply:

- The deadline for receipt of materials is May 18. We hope to send the emails to the HOD on or about May 23.
- All content is the responsibility of the candidate, but content is subject to review. For example, copyrighted material not owned by the candidate cannot be posted.
- Videos and active links to external sites are not allowed, but candidates may list website and email addresses at their discretion.
- Content may not exceed 2 MB.

Past submissions have included campaign flyers, campaign style letters, and personal statements. The material is comparable to what has previously been mailed to delegates or distributed in the not for official business bag.

The HOD adopted this communication as a means to allow candidates to share information with members of the House while prohibiting the distribution of campaign literature by postal mail, disallowing the distribution of campaign materials in the House of Delegates, including in the not for official business (NFOB) bag, and encouraging the elimination of all printed campaign materials as well as a reduction in electronic communication from individual candidates or their surrogates. **Candidates are reminded that electronic communication sent by candidates or on their behalf must include a simple mechanism to allow recipients to opt out of receiving future messages.**

Speaker Recorded Interviews

As requested by the House, the Speakers will again conduct recorded virtual interviews of all opposed candidates. The details, similar to 2020 and 2021, are as follows:

- 1-minute introductory comment
- Series of questions (3-4) with a 1-minute response to each
- Time limits will be strictly enforced
- Interviews will be recorded with a single take to simulate as much as possible a live interview, pauses between questions and answers will not be deleted
- Interviews will be recorded by AMA communications staff and posted on the AMA website
- Interviews will be conducted Thursday, May 12, Saturday, May 14, and Sunday, May 15
- Specific times and a method for signing up will be provided by AMA staff
- Further details including a list of helpful suggestions (i.e., recommended equipment, lighting, background, etc.) to maximize the quality of the recording session, will be sent to candidates prior to the interviews.

Caucus/Delegation Interviews

Although an in-person meeting is planned for June, caucuses and delegations may choose to conduct virtual or in-person interviews. After our recent experience with virtual interview scheduling for our Special Meetings, your Speakers have determined that having the HOD Office compile a list of contact persons for the interviewing groups and for the candidates, simplified the process of scheduling for both caucuses and campaigns. In addition, a centralized official list, as recommended by the Election Task Force, affords transparency to all candidates seeking interviews, while allowing groups to decide if, when, how, and for which contests they wish to interview. Accordingly, the HOD Office will again compile the list of groups wishing to interview for each position and send it to the candidates to schedule directly with the designated

contact persons. **It is the responsibility of the candidates to contact the groups' designated person to arrange an interview.** In addition, the HOD Office will continue to schedule in-person officer interviews for the major caucuses (see below). There will be separate deadlines for groups to submit their contact information for virtual and for in-person interviews. **Each candidate must submit the contact information for their campaign's contact person by April 1 to HOD@ama-assn.org.**

Groups and candidates may begin scheduling interviews after active campaigning begins. All are reminded that if a group offers an interview to a candidate, they must offer a similar interview to all candidates seeking the same position. **At the same time, candidates are reminded that they may not seek an interview from a group that is not included on the official list.**

The Election Committee recently clarified the rules regarding endorsements and questioning candidates. Please see details below.

Virtual Interviews

- Candidates are encouraged to review Policy G-610.020, Rules for AMA Elections paragraph 12 (a- i)
- As per the amended language adopted by the House at N21 (transcribed directly below), virtual interviews are subject to the following constraints:
 - Interviews may be conducted only during a window beginning on the Thursday evening two weeks prior to the scheduled Opening Session of the House of Delegates meeting at which elections will take place and must be concluded by that Sunday (four days later). ***For this meeting the prescribed virtual interview window is May 26-29 (note this is Memorial Day weekend).***
 - Interviews conducted on weeknights must be scheduled between 5 pm and 10 pm or on weekends between 8 am and 10 pm based on the candidate's local time, unless another mutually acceptable time outside these hours is arranged.
 - Caucuses and delegations scheduling interviews for candidates within the parameters above must offer alternatives to those candidates who have conflicts with the scheduled time.
- Delegations/caucuses may only record interviews with prior notice to the candidates, and the recordings may only be shared with members of the interviewing delegation/caucus and only after all candidates in a given race have been interviewed. These recordings may not be used for any other purpose.
- Candidates may only record an interview with prior notice to the interviewing group and the recordings may only be shared with members of the candidate's campaign team.
- Any candidate may decline any interview.

In-Person Interviews

- In-person interviews may be conducted between Friday, June 10 and Monday, June 13, except during House Sessions.
- The HOD Office is scheduling interviews for officer candidates with the regional caucuses that notified the HOD Office of their intent to conduct in-person interviews.
- Any candidate may decline any interview.

As in the past, candidates seeking election to councils must schedule their own interviews and officer candidates may wish to schedule additional interviews with groups not coordinated by the HOD Office.

Nominations and Elections

- As per our normal rules, during the Opening Session of the House on Friday June 10:
 - Nominations for president-elect, speaker and vice speaker will be made from the floor.
 - Candidates for the Board of Trustees will be announced.
 - Each BOT candidate will give a 2-minute self-nominating speech.
 - Council candidates will be nominated by the Board.
 - There will be an opportunity for further nominations from the floor for each contest, after which nominations will be closed. Once nominations are closed there will be no further opportunity for nominations, regardless of the outcome of each election.
 - After the close of nominations for each position, any uncontested candidates will be elected by acclamation.
- Voting in all contested elections will be conducted on Tuesday, June 14 at 8 am at a specific “Election Session” of the House.
- Photos submitted for the election manual will be shown at the time of nomination and election, unless the candidate submits an alternative photo for this purpose to the HOD office before May 21. Email to: HOD@ama-assn.org.

Points of Personal Privilege

Quoting from the Election Task Force Report to the House, “while the task force understands the tradition of thank you speeches by both the victors and unsuccessful candidates, the task force nevertheless prefers that all such speeches be discontinued. No one doubts the sincerity of the thank you delivered by those speaking, but those words of appreciation could better be delivered privately. Moreover, sparing losing candidates the discomfort, often palpable throughout the House, of appearing at a microphone shortly after hearing negative results should be considered a kindness, not a slight, and allows them a graceful exit.” The report went further to suggest that the Speakers, “use their discretion based upon the volume of business at hand and the number of candidates.” Pursuant to this the HOD adopted the following recommendation, “The Speaker is encouraged to consider means to reduce the time spent during the HOD meeting on personal points by candidates after election results are announced, including collecting written personal points from candidates to be shared electronically with the House after the meeting or imposing time limits on such comments.” Given the anticipated volume of business and the 26 announced candidates, we have determined that candidates (successful and unsuccessful) will not be given the opportunity for points of personal privilege during the HOD sessions. Candidates may provide written points which will be collated and sent to the HOD after the meeting. Please email your comments to HOD@ama-assn.org by June 20.

Presidential Debate

As previously communicated to the 3 announced candidates for president-elect, there will be a debate between the candidates to be held at the end of the Opening Session of the HOD on Friday June 10. Each candidate will be invited to give a two-minute introductory comment. Subsequently, a series of questions will be asked with each candidate allowed 60 seconds to

respond. We anticipate about 9 questions on a broad array of topics. Finally, each candidate will be asked to give a 60 second closing remark. The order of introductory comments, initial question response, and closing comments will be determined by lot, and the order of subsequent question responses will be rotated among the candidates.

Endorsements

The Election Committee recently reviewed the rules regarding candidates seeking endorsements and groups conducting written questionnaires of candidates. Concerns have been expressed in the past that candidates were campaigning before active campaigning is allowed (after the BOT formally announces the candidates) under the guise of “seeking endorsements not votes.” In addition, groups were determining their endorsements by asking candidates to complete questionnaires or to answer questions in person prior to the allowed interview window. After due consideration, the Election Committee provides the following interpretation of the relevant rules to provide clarity:

- Any communication or activity undertaken to seek endorsement from groups of which the candidate is not a current member after the announcement of candidacy and prior to the April Board meeting (active campaign period) would be considered active campaigning and, therefore, a violation of the election rules (*emphasis added*)
- Any formal questioning of an announced candidate, including written questions, would be considered an interview, and, therefore, subject to the rules for interviews (*emphasis added*)

Interpretation of Rules in Response to Questions Received

Many of the received inquiries are answered in the information provided above. Your Speakers want to emphasize that the following is our best interpretation of the current campaign rules, but any action that may potentially be interpreted by any member of our House as falling outside of our campaign rules COULD be reported as a violation. As per the recent decision of the AMA Board of Trustees regarding the recommendations of the Election Committee Report that were referred for decision at N21, any reported potential violation would then be investigated and adjudicated individually by the Election Committee on which your Speaker and Vice Speaker serve with vote.

We received multiple questions related to candidate communications to the House. They mainly fall into two categories: postal mail and email. The questions are compiled first followed by our composite answer.

- **What communication is allowed prior to the April BOT meeting?**
- **In determining “mass communication,” what percent of the House is a “significant portion”? What if we send the message in multiple emails to smaller groups instead of all at once?**
- **What constitutes "campaign materials?"**
- **Is it permissible for a candidate, or someone in support of a candidate, to send a message to a member of the HOD using personal stationery sent by the US Postal Service?**
- **Can candidates send handwritten notes to all the delegates like has been done in the past?**
- **Can candidates send individual emails in addition to the email sent by the HOD Office?**

- **Can individuals besides the candidate send emails to delegates supporting the candidate or simply providing information about the candidate's qualifications?**
- **Do personal, individual email messages need to include an opt out option? What types of electronic communication, for example social media, is allowed?**

Several rules apply.

First, Policy G-610.020, Rules for AMA Elections(10), clarifies that no communication to “all or a significant portion” of the members of the House of Delegates and communicated by or on behalf of the candidate may be sent before the start of active campaigning which begins after the BOT announcement of candidates typically in April.

The rules do not specify a percent or number. Therefore, any communication sent to HOD members prior to the start of allowed active campaigning may be perceived by recipients as a “violation” of this rule and could elicit a complaint. Certainly the more broad the communication the higher the risk. It is our opinion that simply parceling the roster of delegates into several communications, or even among members of the campaign team, to send a communication to multiple members of the House would not protect a candidate from a claim of mass communication.

As noted in the preceding question, Rule 15 specifically prohibits campaign materials distributed by postal mail or its equivalent,” (i.e., any physical delivery to a home or office). This broad rule would seem to apply to letters and notes sent by candidates or their campaign teams if they contain campaign material. Information about the qualifications of a candidate, encouraging support, or asking for a vote would be considered campaign material. This rule makes it clear that handwritten notes sent to a majority of the House by postal mail would be a violation. On the other hand, we do not believe that the intention was to prevent individuals from sending personal notes or cards to friends and colleagues. The best answer may lie in the perception of the recipient of the communication - do they perceive your communication as “campaign material” and are they likely to report a potential violation?

In regards to electronic communication, we would point out that our rules (Policy G-610.020, Item 16) encourage minimizing electronic communication from candidates and on behalf of candidates. To quote the ETF report, “A goal of the ETF was to create an equal opportunity for all candidates to share information regarding their candidacy while also reducing the amount of unwelcomed material that delegates receive. At the same time, the task force did not want to create communication rules that would be difficult to track and enforce. While this recommendation does not prohibit candidates from sending their own additional electronic campaign messages, campaigns are reminded that current campaign rules require that any such communication must include an “unsubscribe option.” Many delegates expressed that electronic communications from individual candidates are unwanted and may even negatively impact their view of the candidate. Given the electronic communication we propose to be sent by the HOD office on behalf of all candidates it should be anticipated that additional electronic communications from individual candidates would not be well received. With the enhanced opportunity to communicate, we would anticipate less tolerance of mass communications by candidates and more reporting of the failure to include an unsubscribe option for all such campaign related emails.” (emphasis added)

An email sent from one personal friend to another would presumably not be considered campaign materials by the recipient and would not require an opt out mechanism. Again, this would need to be considered from the viewpoint of the recipient. Any individual can file a

complaint if they perceive the communication to be campaign material that did not include an opt out mechanism.

In regards to others acting on behalf of a candidate, Rule 10 above, as well as other rules, makes it clear that activity of others acting on behalf of a candidate may result in a campaign violation. This is not a new rule or new interpretation.

The House amended Rule 9 by addition which now includes the following statement, "The Election Manual provides an equal opportunity for each candidate to present the material he or she considers important to bring before the members of the House of Delegates and should relieve the need for the additional expenditures incurred in making non-scheduled telephone calls and duplicative mailings. The election manual serves as a mechanism to reduce the number of telephone calls, mailings and other messages members of the House of Delegates receive from or on behalf of candidates."

In addition, we would remind you of the many opportunities to communicate afforded to all candidates including the election manual, the email to be sent by the HOD office, candidate websites to be posted by the AMA, recorded interviews by the Speakers, virtual and in-person interviews with interested groups, and of course personal interaction with individuals or small groups once active campaigning is allowed.

In regards to social media and similar electronic communication, the rules seem to be more lax. In their report, the Election Task Force stated, "We do not recommend attempting to prohibit or control social media. These forms of communication are embraced by many and importantly individuals must elect to go to the sites or join to receive messages. Since these are not "pushed" to anyone, it should eliminate the concerns of those that feel overwhelmed with electronic information while still providing a resource for delegates that want more information about the candidates." At this time, your Speakers would concur but this topic may be something the Election Committee may wish to monitor.

Can a candidate participate in the AMA Candidates Reception and a reception sponsored by their state/coalition/section?

Candidates may be "featured" at only one reception but may attend any open reception just like any other member of the HOD - this is not a new rule (Policy G-610.020 paragraph 22). Candidates can opt to be featured at a single reception sponsored by a state, specialty or other group, but if they do so, they may not be featured at the AMA Candidates Reception. The Election Task Force proposed the AMA Candidates Reception to make campaigning less expensive, not to add another reception to the list. See above for further information regarding the AMA Candidates Reception.

Does there have to be a minimum number of participating candidates to hold the AMA reception?

The AMA Candidates Reception is not dependent upon the number of candidates that elect to participate. Candidates will have to notify the HOD Office before April 18 if they want to be "featured" at the AMA Candidates Reception so we can plan accordingly.

How will the cost to individual candidates of the AMA reception be determined? Will it depend on how many candidates participate?

General reception costs will be borne by AMA. Candidates will be responsible only for any expense to “decorate” their individual table and poster(s). Again, the goal is to make elections less expensive and to create a relatively level playing field.

Will links to individual websites be allowed in the Election Manual?

The election manual will link to the AMA Candidate’s Webpages just as it does to the conflict-of-interest disclosure, but links to external pages (individual websites or email addresses) are not allowed. The rule is found in paragraph 9 of Policy G-610.020, “Rules for AMA Elections.” the underlined sentence was added to the existing rule at the June 2021 Special Meeting:

(9) An Election Manual containing information on all candidates for election shall continue to be developed annually, with distribution limited to publication on our AMA website, typically on the Web pages associated with the meeting at which elections will occur. The Election Manual will provide a link to the AMA Candidates’ Page, but links to personal, professional or campaign related websites will not be allowed. The Election Manual provides an equal opportunity for each candidate to present the material he or she considers important to bring before the members of the House of Delegates and should relieve the need for the additional expenditures incurred in making non-scheduled telephone calls and duplicative mailings. The Election Manual serves as a mechanism to reduce the number of telephone calls, mailings and other messages members of the House of Delegates receive from or on behalf of candidates.

Any submissions that included a link to an external site were edited appropriately.

Will links to individual websites be allowed on the AMA Website Candidates’ Pages?

The AMA Candidate Website will not allow active links (hyperlinks) to websites or emails or any other online materials (videos, social media, etc). However, candidates will be allowed to include passive links (ie., email address, website URL, or social media addresses) in the material submitted.

We hope this helps answer your concerns. We cannot predict how others might interpret the rules, but any action that may potentially be interpreted as falling outside of our campaign rules COULD be reported as a violation. Each such report would then be investigated and adjudicated individually by the Election Committee on which your Speaker and Vice Speaker serve. The safest course is to adhere to a narrow interpretation of the rules. Our hope is to have as few complaints as possible. Thank you for your willingness to serve our AMA. We wish you all the best of luck.

Bruce and Lisa