



**NAMA**<sup>®</sup>

NATIONAL AYURVEDIC  
MEDICAL ASSOCIATION



**2016/17 Annual Report**



# INTRODUCTION

## ABOUT THE REPORT

With the support of our members, sponsors and media partners NAMA represents the Ayurvedic profession and community across the United States. This annual report provides an opportunity for our members and the general public to understand the efforts put forth by NAMA during our 2016 fiscal year (July 1, 2016 – June 30, 2017). We hope you find this report valuable, and we look forward to continuing to serve the Ayurvedic profession and community in years to come.

## STATEMENTS COMPLYING WITH CALIFORNIA CORPORATE CODE

NAMA is a 501(c)(6) nonprofit California corporation.

Our corporate address is:

National Ayurvedic Medical Association

8605 Santa Monica Blvd, #46789

Los Angeles, CA 90069-4109

Phone: 1-800-669-8914

NAMA was officially incorporated in July 2000. NAMA's corporate documents are available on it's website, [www.ayurvedaNAMA.org](http://www.ayurvedaNAMA.org)

A listing of names and addresses of members is maintained by our staff on a secure CRM site and is monitored regularly. Per the organization's by-law 6.02, members have the right to request in writing and receive a financial report of the organization pursuant to California Corporations Code 8321(a).



NATIONAL AYURVEDIC  
MEDICAL ASSOCIATION



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# About Us

**NAMA is the voice of the Ayurvedic community that empowers individuals, communities and humanity to achieve health and well-being through Ayurveda.**

In 1998, four people, passionately interested in the expansion of Ayurveda in America, began to meet monthly to formulate a structure to support the Ayurvedic Practitioner and classical Ayurvedic education and practice in the U.S. In 2000, they incorporated as the National Ayurvedic Medical Association.

NAMA has grown to become a twelve member elected board of directors with more than 1,300 members. Every year, a minimum of four board seats are slated for election. This allows for continuity within the board while providing members the opportunity to nominate and elect sitting or new candidates.

NAMA has various committees that support the key work efforts of the association, including Membership, Standards, Communications, Ethics, Elections and Conference Planning Committees. Other committees and work groups are established as needed for the effective work of the organization.



## OUR MISSION

### Mission:

The National Ayurvedic Medical Association represents the Ayurvedic profession in the United States of America. Our mission is to preserve, protect, promote and advance the consciousness-based philosophy, knowledge, science and practice of Ayurveda for the benefit of all beings.

### Vision:

NAMA is the dynamic voice of the Ayurvedic profession; empowering individuals, communities and humanity to enhance health, well-being and self-awareness through Ayurveda.

## OUR GOALS

To serve as a representative membership organization of the Ayurvedic profession.

To serve as an official spokesperson for and representative of the Ayurvedic profession in the United States.

To establish and maintain standards of education, ethics, professional competency and licensing.

To establish in the public mind an understanding which will assure maximum recognition and acceptance of the Ayurvedic profession, its programs and practices.

## PURPOSE

The purpose of the Association is to provide leadership within the Ayurvedic profession and to promote a positive vision for Ayurveda and its holistic approach to health and wellness. We will carry out our mission by creating and implementing a dynamic strategic plan to ensure the professional growth and success of Ayurveda.

## >> 1998

Established in 1998

Kumar Batra, Cynthia Copple, Marc Halpern and Wynn Werner begin conversations about starting the organization.





## >> 1998

### NAMA Founders

Kumar Batra, Cynthia Copple, Marc Halpern and Wynn Werner begin conversations about starting the organization.

## >> 2003

### Board grows to 12

Education Committee starts working on setting standards for the profession and first national conference is held in St. Petersburg, FL

## >> 2006

### Grandfathering

The grandfathering process begins and the 500 and 1500 hour categories are developed.

## >> 2012

### Employee Expansion

NAMA expands staff and creates Membership Manager role, improves and updates website, and Ayurvedic Health Counselor guidelines established.

## >> 2016

### First AHC Exam

NAMA expands employees and hires an Executive Director and Credentialing Coordinator. The Ayurvedic Yoga Therapist guidelines are established and the first AHC exam is developed.

# Timeline 1998 2017

## >> 2000

### NAMA Incorporates

Incorporates as a 501(c) (6) in California. Founders then bring in 5 new board members and sets mission, purpose and goals.

## >> 2004

### 500 hrs

The 500 hour educational standard set as a baseline for professional membership.

## >> 2009

### Partnerships

Partnerships with outside organizations begin. IAYT, APA, AHPA and Ayurvedic schools join as members. The development of 3 professional levels and Scopes of Practice took place.

## >> 2014

### AP, AD Guidelines

Ayurvedic Practitioner and Ayurvedic Doctor guidelines are established. Grandfathering of current professional members and National Exams Committee is formed. Communications Manager role is established.



## DIRECTOR STATEMENT



### WORDS FROM DIRECTOR

It has been a very full and rewarding year for me as the newly appointed Executive Director of NAMA. The NAMA Board has done an amazing job running the organization for the past 16 years on a volunteer basis with a very small part-time staff. This past year was the time for our organization to take the leap and invest in our infrastructure and staff.

I am happy to report that we are in good health and looking to expand and enrich our abilities to serve our membership and larger Ayurvedic community. I am so pleased to be working with this board and our wonderful staff – Tesia Love - Membership Manager, Julie Wardwell - Administrative Assistant, Kathy Jo Staheli – Communications Coordinator and Arya Hawkins – Credentialing Coordinator.

As we move forward into our next year we hope to improve our website, offer more continuing education opportunities for all our professional categories, develop enriching conferences and support more Ayurveda throughout the United States.

Please feel free to reach out to me and our staff at any time. We love to hear from you.

In loving service,  
**Hilary Garivaltis**  
 Executive Director



## OUR BOARD MEMBERS

The National Ayurvedic Medical Association consists of 12 elected board members providing a diverse perspective in our efforts each year.



**DHAVAL DHRU**  
 Board President

Dhaval Dhru, MD is a retired ENT surgeon and an Associate Professor and Chair of the Department of Ayurvedic Sciences at Bastyr University. He conducts Ayurvedic retreats and teaches Ayurvedic seminars globally.



**MARGRIT MIKULIS**  
 Board Secretary

Margrit Mikulis, ND is a naturopathic practicing in Nashua, NH. She is a faculty member of the Kripalu School of Ayurveda and is a specialist in Lyme disease, with a clinical approach using Ayurveda and integrative medicine.



**JOHN MATTHEWS**  
 Board Treasurer

John is the former president of the International Institute for Yoga and Ayurveda and of the Yoga Alliance. John has served on the NAMA Standards Committee for the past three years and led the certification efforts this year.



**HILARY GARIVALTIS**  
 Executive Director

Hilary Garivaltis, AP is the principal founder of Ayurvedic Health Education Services LLC, which offers educational programs in Ayurveda. She is the founder and former Dean of the Kripalu School of Ayurveda.



**K.P. SINGH KHALSA**  
 Board Member

Karta Purkh Singh Khalsa, DN-C, LMT, NCTMB, CC has over 40 years of experience in holistic medicine and is one of the foremost natural healing experts in North America. Khalsa is the President Emeritus of the American Herbalist Guild.



**ERIC GRASSER**  
 Board Member

Eric Grasser, MD is a graduate of Stanford University and Dartmouth Medical School. He is a Clinical Assistant Professor at the University of New Mexico, Department of Family and Community Medicine.



## OUR BOARD MEMBERS

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**JAYARAJAN KODIKANNATH**  
Board Member

Jayarajan Kodikannath, B.Sc., BAMS, is the academy director of Kerala Ayurveda. He has held the position as Chief Medical Officer of Ayurveda Gram and recently served on the curriculum committee for Bastyr University.



**SUHAS KSHIRSAGAR**  
Board Member

Suhas Kshirsagar, BAMS, MD (Ayu), PhD, holds a gold medal from the prestigious Pune University in India. An academically accomplished Ayurvedic educator, Dr. Kshirsagar has played a key role in popularizing Ayurvedic Medicine worldwide.



**WYNN WERNER**  
Board Member

Wynn Werner, is a founding board member and past president of NAMA and the current administrator of the Ayurvedic Institute and played a key role in passage of New Mexico's Health Freedom Law .



**ALAKANANDA MA**  
Board Member

Alakananda Ma, MD, BS graduated as a physician from St. Bartholomew's Hospital Medical College. She is one of the first Western physicians to dedicate her life to Ayurveda. She is the principle teacher of Alandi Ayurveda Gurukula.



**JENNIFER RIOUX**  
Board Member

Jennifer Rioux, PhD, is a Clinical Supervisor at the Ayurvedic Institute. She has been an educator and researcher at the University of North Carolina Chapel Hill, the University of Arizona, and the University of New Mexico.



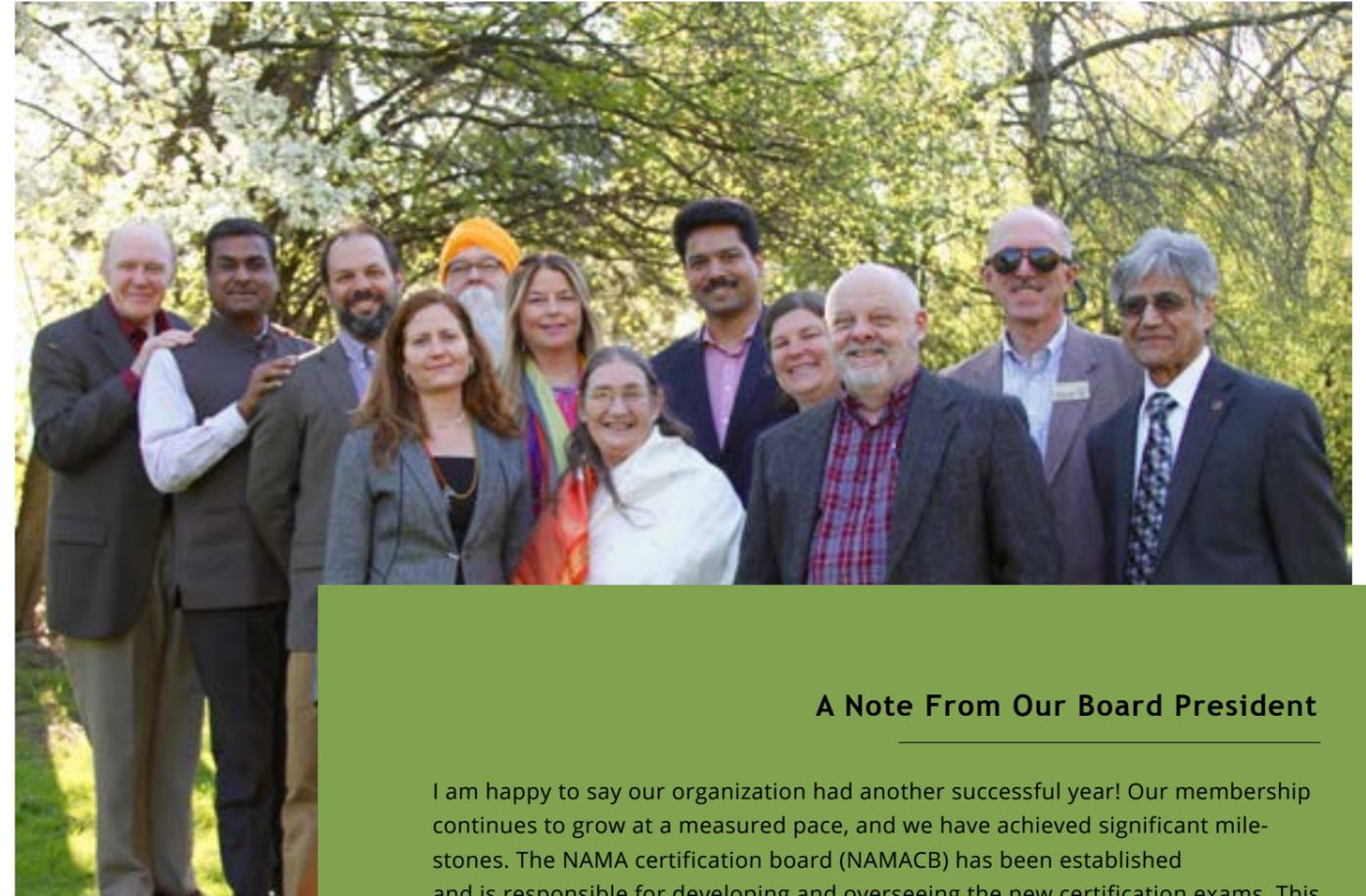
**WILLIAM DEAN**  
Board Member

William Dean, MD, practiced allopathic urology for 30 years and, in the last 10 years of his practice, introduced Ayurvedic solutions to common problems not addressed by allopathic urology.



## OUR COMMITMENT TO SERVICE

Our board members are honored to have the great opportunity to serve the NAMA community with dedication and integrity, and to uphold the values and goals of NAMA. Thank you for your trust in us!



### A Note From Our Board President

I am happy to say our organization had another successful year! Our membership continues to grow at a measured pace, and we have achieved significant milestones. The NAMA certification board (NAMACB) has been established and is responsible for developing and overseeing the new certification exams. This is an exciting step for the future of the profession of Ayurveda in the United States.

I want to express my appreciation and sincere thanks to all the board and committee members for their self-less service to the organization and the Ayurvedic profession. I would also like to acknowledge and thank our ED, Hilary Garivaltis for her dedication and leadership and all the staff members for their effort and commitment to make NAMA achieve its goal. And last but not least, I would like to express my sincere appreciation to all of our members for your continued support and trust in NAMA.

Sincerely,

**DHAVAL DHRU**  
NAMA Board President



# STRATEGIC PLANNING AND FINANCE

**Committee Chair:** Margrit Mikulis & KP Khalsa **Committee Members:** Dhaval Dhru, Hilary Garivaltis, John Matthews



## WE FOCUS TO MAKE EFFECTIVE PLANS TO REACH OUR FINANCIAL GOALS!

The Strategic Planning and Finance Committee works together with staff to ensure the financial stability of the organization, as well as looks at strategies to grow and expand.

### Goals of Committee

- Generate revenue for operational costs.
- Generate revenue for legal funds
- Generate revenue for special projects
- Generate revenue for nonprofit investments.
- Explore starting an umbrella 501 ( c ) ( 3 ) organization to allow for tax deductible contributions.



### PLANNING

Our committee supported the development of a five-year strategic plan for the National Ayurvedic Medical Association, focusing on key corporate areas, including a conference plan, membership plan, and credentialing plan.



### GOALS

To insure growth of our annual conference, membership and our credentialing program for the Ayurvedic professional.



### MOTIVATION

The committee motivation is to keep an eye on the future of the Ayurvedic profession and to support solid growth within the Association toward this end.



# A REVIEW

## BY MARGRIT MIKULIS

Our committee supported the development of a five-year strategic plan for the National Ayurvedic Medical Association. We focused on key corporate areas which include a conference plan, a membership plan, and a credentialing plan.

Our committee goals were centered around the growth of our annual conference, membership growth in all categories and development of a credentialing program for the Ayurvedic professional. With the support of the Board of Directors, we have created strategies to increase our attendance at our annual conference, providing the community with innovative educational opportunities emphasizing the need to include our global Ayurvedic community. We set targets to create more of a bridge and expansion within the western medical community and have set goals to increase our partnerships with other organizations.

In earnest, we have developed our plan to highlight our membership, particularly, our professional members who are growing in numbers around the United States and globally. We recognized the need to continue our emphasis on supporting our professional members in the next five years so that individuals and the community can benefit from NAMA's support and guidance within the profession.

We have dedicated the time and resources to advance the field through our credentialing efforts which will prove to enhance the growth of Ayurvedic medicine within the medical community at large.

Our committee supported the development of this strategic plan because we recognized the importance, the timeliness and the intensity of our professional growth. We are looking forward to the future of our organization, and we feel encouraged that we have put strategies in place which will benefit the profession for years to come.

Margrit Mikulis, ND





# LEGAL COMMITTEE

**Committee Chair:** Hilary Garivaltis 2016/Wynn Werner 2017 **Committee Members:** Heather Baines, Susan Etheridge, Jasmine Grace, Eric Grasser, Jayarajan Kodikannath, Suhas Kshirsagar, Sudhir Singh, Maria de Sousa

## 1. Practice Issues

- Legal freedom to practice
- Establish a licensing strategy and plan/ Regulation of the profession practice

## 2. Product Issues

- Keeping up to date on FDA regulations and good manufacturing regulations
- Monitoring and reporting on AHPA activity
- Monitored and introduced trademark for NAMA and the NAMACB
- Heavy Metals and CA prop 65

## 3. Advocacy & Lobbying

## 4. State Association Relations

## 5. Liability Insurance

## Committee Work

- Wynn Werner and Susan Etheridge provided a "Safe Practice" overview at the April 2017 Preconference Professional Forum attended by over 80 participants. The committee is producing seminars to share with members as well as a follow-up for the 2018 Preconference Professional Forum.
- Working on creating relationships with all the current and future state organizations with the goal to serve the full Ayurvedic professional community.
- Handed off the trademark work to the newly appointed Executive Director to manage.
- Recommended the NAMA Board hire Susan Etheridge, PA from Alternative Health Law Firm in Tampa, Florida to act as the NAMA attorney moving forward. Board accepted and holds her on retainer for the organization.
- Working on creating relationships with all current and future state organizations with the goal to serve the full Ayurvedic professional community.



# 2016-2017 NAMA ACHIEVEMENTS



## NAMACB

Launched the National Ayurvedic Medical Association Certification Board as an Ayurvedic certification organization in The United States of America.



## PACE

Increased the level of continuing education programs approved and offered to professional members.



## AHC EXAM

Implemented the AHC certification exam providing the first official Ayurveda examination process in the United States.



## AP Beta Exam

Developed a Beta test for the Ayurvedic Practitioner level examination. It is currently in process and we hope to launch the official exam next year.



## Largest Conference

Held the 13th National NAMA Conference. It was the most attended to date. We look forward to continued growth of our conference event each year.



## Introduction of AD

Implemented the Ayurvedic Doctor professional member category. Grandfathering of long standing professionals ended September 30, 2017.



## GLOBAL CONNECTIONS



Our 2017 conference was a great hit! We were so honored to have members from the Ministry of AYUSH India join us at this year's event. We are thankful for their support and recognition and look forward to their continued support as we grow our organization.

Special Guests from Ministry of AYUSH India – Farah Ahmed and Dr. Abhimanyu Kumar



# OUR STAFF

The NAMA staff are all practitioners of Ayurveda as well as dedicated to the valuable roles they provide for this organization. Their experience in the field provides our membership with additional insights we might never have had.



## Hilary Garivaltis, AP

Hilary Garivaltis is NAMA's Executive Director and is the principle founder of Ayurvedic Health Education Services LLC, which offers educational and training programs in Ayurveda throughout the U.S. and Canada. She is the founder and former Dean of the Kripalu School of Ayurveda. Hilary, received her training at the New England Institute of Ayurvedic Medicine with advanced training in India from the Rishikesh College of Ayurveda and the Jiva Institute.



### Tesia Love, AP

Tesia Love is an Ayurvedic Practitioner and NAMA Professional Member currently serving as Membership Manager for NAMA, a position she's held since June 2015. Prior to becoming a part-time employee of the Association, she volunteered on the Membership and 2015 Conference Planning committees. Tesia is based in Charlotte, NC where she runs her clinical Ayurveda practice specializing in women's health offering Ayurvedic consultations and body therapies.



### Kathy Jo Staheli, AD

Kathy Jo Staheli, AD is the founder of Purusha Ayurveda Wellness and Panchakarma, offering authentic full service residential Panchakarma programs and clinical Ayurvedic services. She worked with Kerala Ayurveda as the global business development manager and currently serves as NAMA's Communications Coordinator. Ayurveda is Kathy Jo's passion and she loves serving the NAMA community.



### Julie Wardwell, AP

Julie Wardwell, CAS, LMT, AYT is an Ayurvedic Practitioner specializing in yoga therapy and Ayurvedic massage for women's wellness. She provides Ayurvedic education, consultations, yoga therapy, and herbal preparation to those seeking to improve their health. She is the Administrative Assistant for NAMA and enjoys supporting the growth of Ayurveda nationally.



### Arya Early Hawkins, AP

Arya started volunteering for NAMA in 2012 and began working for NAMA in 2014 and currently serves as the Credentialing Coordinator. He also practices Ayurveda, studies computer science, and plays the piano. He enjoys traveling, partying, and being at the beach.



# MEMBERSHIP COMMITTEE

**Membership Manager and Committee Chair:** Tesia Love **Committee Members:** Vishnu Aragona, Larry Mangel, Jackie Rae Richard, Nicole Taylor, Katie Ziem, Tracy Zuschlag

## On-going Responsibilities

- Recommend policies and direction to the organization in order to support the growth and viability of the organization's membership.
- Assess membership benefits, dues levels and requirements and make recommendations to the Board of Directors as necessary to support the organization's growth.
- Work on membership retention issues as well as ways to attract new members in all membership categories.
- Provide consistent communication to the membership in partnership with the Communications Committee through the e-Newsletter and online resources.
- Supervise processing of professional membership applications and the approval of new professional members.
- Oversee the processing of student membership applications to assure the student status of each applicant is confirmed.
- Work with schools and other organizations to encourage Organizational Membership growth.
- Oversee implementation of the NAMA Professional Ayurvedic Continuing Education program and requirements.
- Identify ways to clarify what the NAMA membership needs and find ways to meet those needs.
- Address issues brought by members to the association.

## FOCUS FOR FY 2017

- Increase overall membership by retaining current members and acquiring new members through free student membership offer, collaboration with member schools, and strengthening professional member support.
- Produce a half-day Professional Member Forum to be held Friday, April 20, 2018 in order to provide additional education and information to professional and organizational members about issues directly related to our profession.
- Continue to increase the number of discount benefits available to NAMA members.
- Strengthen member awareness and understanding of membership benefits.

## MEMBERSHIP SUMMARY 2016 / 17

### Membership Growth



### Retention Rate



# 19%

## Professional Membership Growth

Our Professional Membership level as of June 30, 2017: 918, an increase of 19% over FY 2015.



# 33%

## Student Membership Growth

Our Student Membership level as of June 30, 2017: 181, an increase of 33% over FY 2015.



# 28%

## General Membership Decrease

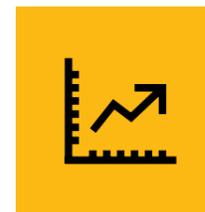
Our General Membership level decreased to 124 as of June 30, 2017, a 28% decrease under FY 2015.



# 6%

## Organizational Membership Growth

Our Organizational Membership as of June 30, 2017: 56, a 6% increase over FY 2015.



# 13%

## Total Growth

Membership during the year grew from approximately 1,133 members to 1,279 with a 70% member retention rate.



# MEMBERSHIP SUBCOMMITTEES



## CONTINUING EDUCATION

**Chair:** Tesia Love

**Members:** Susan Etheridge, Om Kailas, Ketsy Quarles, Kathy Jo Staheli, Raven Townsend

### Achievements

- Approved and listed XX PACE Programs.
- Improvements & clarification on PACE standards.
- Continuing education recommendations for NAMA Certification Board Standards.

### Focus

Support the NAMACB & NAMA Membership Committee as needed to further improve the PACE credits and listings.



## NAMA SCHOOLS

**Chair:** Dr. William Dean, MD

**Members:** The appointed person of each school organizational membership.

### Achievements

- Started monthly call for all committee members.
- Presented special topics and updates.
- Hosted half-day meeting for school administrators at the 2017 conference.

### Focus

Help to work with schools on future accreditation efforts.



## STUDENT WORK GROUP

**Chair:** Ellen Leonard

**Members:** Renee Auriemma, Minta Davis, Jenny Griffith, Heather Grzych, Lucy Lyudmyla Vasylenko, Katie Castellanos, Danica Lynch, Rebecca Caudill, Mona Bhatt

### Tasks

- Facilitated and managed the monthly Seminars in Ayurveda lecture series, which is available to the public and offers free PACE credits to NAMA professional members.
- Dissolved as a formal work group in May 2017. The Seminars in Ayurveda work now directly reports into the Membership Committee.

**Thank you Student Work Group for your Service!**



## MEMBERS FORUM

Presented the 6th Professional Members' Forum with Susan Etheridge, JD and Felicia Tomasko prior to the NAMA conference on April 21, 2017. The forum offered invaluable support and guidance regarding legal considerations for clinical Ayurvedic practice.

## FEE CHANGES

At the direction of the NAMA board we now offer free Student Memberships. We also increased the General Membership dues from \$50 to \$100. This category includes; General Supporter, International Supporter and Allied Health Professional.

## MEMBERS OFFERINGS

Secured new discount benefits for NAMA members, including 25% off retail online orders of VPK by Maharishi Ayurveda, in addition to the offers established in FY 2015. The Ayurveda Journal of Health, Banyan Botanicals, Organic India.

## LIABILITY INSURANCE

Secured a vetted professional liability insurance option for NAMA members - AlternativeBalance.net, including a discount off the already affordable annual premium. Members can access the discount code via the NAMA member center online.

## AYURVEDIC DOCTOR

Launched the Ayurvedic Doctor level of professional membership, resulting in 34 professional members at the Ayurvedic Doctor level. Also, provided article resources on what it means to be an Ayurvedic Doctor in the United States.

## CERTIFICATION EXAM

Supported the processing and launch of NAMA's national certification exams, including the Ayurvedic Health Counselor beta test and official exam, as well as the launch of the Ayurvedic Practitioner beta test.



## NOMINATIONS/ELECTIONS COMMITTEE

**Elections Committee Members:** Margrit Mikulis, ND, AP; William Dean, MD, AD

### Highlights of the 2016-2017 Elections

The Elections Committee successfully oversaw the 2017 Board of Directors election and appointed new Board Members according to the organization's bylaws.

403 votes or 30% of eligible voters - more than met our requirement for a legitimate election.

Votes went to re-elect one sitting board member, Dhaval Dhru, MD.

Three-year term seats went to Dhaval Dhru, MD; Anupama Kizhakkeveetil, BAMS, MAOM, Ph.D.; Raja Sivamani, MD, MS; and Amish Shah, and the two-year term went to Ellen Leonard, AP.



### We Welcome You to Join!

NAMA welcomes potential candidates who have a desire to run for NAMA's Board of Directors. As our association continues to grow and expand, we seek members who are skilled in areas such as financial management, project development, legal and political action, and technology.

To be eligible as a board candidate, you must have been a NAMA member for at least one year at the time of submitting your candidacy and be a resident of the United States of America. The call for nominations is announced in May of each year.

The Nominations and Elections Committee supports the growth of the organization and gives potential board members a strong understanding of what NAMA is all about.

Contact us at [nama@ayurvedaNAMA.org](mailto:nama@ayurvedaNAMA.org) to discuss what is required and learn how you can begin to actively serve our association today!



## NAMA's Accreditation Project

By Daniel Seitz, JD, EdD

This past July, NAMA embarked on one of our most important projects to date: the creation of an accrediting process for Ayurvedic professional education programs. As many of you know, accreditation is a widely used approval process for higher education programs in the U.S., including clinical programs in a wide variety of medical and healthcare professions. Accrediting agencies establish curriculum and other standards for education in a professional or academic field and then determine whether individual schools meet the standards. In short, the job of accreditors is to ensure high-quality education and training.

Why is accreditation important for the Ayurvedic profession? Apart from ensuring that students receive a quality education that enables them to be competent practitioners, accreditation is essential to our profession's credibility. Every recognized licensed medical and healthcare field in the U.S.—whether conventional medicine, traditional Chinese medicine, dentistry, nutrition or chiropractic—has a well-established accreditation process. Without one for Ayurvedic medicine, our long-range goal of professional licensure would be impossible to achieve, and acceptance of our field by the general public would be impeded. Moreover, accreditation can help open doors, whether for health insurance coverage for Ayurvedic services or new opportunities for Ayurvedic practitioners to work in conventional clinical settings. NAMA decided to undertake this project at this time for three reasons:



- ▶ We already have in place well-established educational standards for three levels of practice—Ayurvedic Health Counselor, Ayurvedic Practitioner, Ayurvedic Doctor—that will serve nicely as a basis for our accreditation process, and have just recently developed standards for two additional levels: Ayurvedic Yoga Therapist and Panchakarma Technician;
- ▶ We have already developed (or are currently developing) a certification process for individual professionals that corresponds to these educational levels; and
- ▶ We have already developed (or are currently developing) a certification process for individual professionals that corresponds to these educational levels; and

Although NAMA is spearheading this project, we are committed to working with the entire Ayurvedic community to create an accreditation process that reflects our shared needs and aspirations. As we develop draft standards and policies, we will share them with the community and ask for feedback. We are committed to a transparent process.

We have appointed a knowledgeable group of Ayurvedic educators and practitioners to assist in developing accreditation standards and policies: Kathleen Savita Brownfield, CEO at the Mount Madonna Institute; Gerard Buffo, AP, MD, former dean of the Kripalu School of Ayurveda; Dhaval Dhru, AP, MD, chair of the Department of Ayurvedic Sciences at Bastyr University and NAMA board president; Erin Kreeger, PhD, dean of education at the Ayurvedic Institute; and Alakananda Ma, AD, MD, faculty member and academic dean at the Alandi Ashram School of Ayurveda and NAMA board member. Assisting and guiding the accreditation working group are NAMA Executive Director, Hilary Garivaltis, AP, and Daniel Seitz, JD, EdD, an expert in higher education accreditation and a professional facilitator.



# THE HIGHLIGHT

We are happy with our results as an organization in 2016-2017. Here are some numbers at a glance.



## 21%

### INCOME GROWTH

This year we had a lot of added expenses in our efforts in developing the certification exams. Because of this, our costs outweighed our income.

With this said, we are excited to announce that the organization still had a 21% overall income growth this fiscal year, allowing us to continue to strive to reach our goals.



## 5

### EMPLOYMENT

Currently NAMA employees 5 part time employees. These positions were once held by volunteers, board and committee members. With our continued success, we look forward to expand in the future years with employment positions.



## + 17%

### CONFERENCE GROWTH

The 2017 13 th National NAMA conference was the most attended to date. We look forward to continued growth of our conferences event each year.

### SPONSOR GROWTH

Our organization realizes the efforts of our community and other agencies provide to support our growth. We thank all of those who believe in us, and we look forward to building with you! We now have new Tea Sponsorship levels and Media Partner opportunities.

#### NEW CONFERENCE TEA SPONSORS



#### MEDIA PARTNERS OPENINGS



## +146

### MEMBERSHIP GROWTH

The work of the team lead by the membership manager has been a success. The organization has increased its members by 146 this year.



### SERVICE GROWTH

By implementing the new AD category and the official AHC exam, NAMA has had tremendous growth in our services. We have also expanded our staffing hours, allowing for us to serve our members better.





## STANDARDS COMMITTEE

**Committee Chair:** Alakananda Ma **Committee Members:** Arun Deva, Dhaval Dhru, Hilary Garivaltis, Jayarajan Kodikannath, Suhas Kshirsagar, Margrit Mikulis

### Committee Overview

The focus for the 2016 fiscal year has been on finalizing competencies for the Ayurvedic Yoga Therapist (AYT) and PK technician as well as grandfathering for AYT. This year saw some major developments in the standards arena with creation of the NAMA Certification Board (NAMACB) to oversee the National Exams and grant appropriate certifications. The standards committee also refined the definition of online classes and established specific contact hours for the AHC and AP categories.

## NATIONAL EXAM SUBCOMMITTEE

**Chair:** Hilary Garivaltis **SubCommittee Members:** Dhaval Dhru, Gerard Buffo, Jayarajan Kodikannath, Kristen Schneider, Niketa Joshi, Wynn Werner, Anusha Sehgal, Diana Lurie, Jay Apte, Bill Dean, Monica Groover, Anupama Kizhakkeveetill, Devi Mueller, Erin Casperson, Ala Sudol, S.Prasad Vinjamury, Manjusha Vinjamury, Jennifer Rioux, Rosy Mann, Cynthia Copple, Parla Jayagopal, Luren Sauer

The National Exam Subcommittee, in coordination with Kryterion, Inc. created and beta tested the first Ayurvedic Health Counselor (AHC) exam and AHC exam study guide. The AHC exam became an official requirement for NAMA professional membership in May 2016. All current AHC members of NAMA were automatically granted the title Certified Ayurvedic Health Counselor (CAHC) awarded by the new NAMA Certification Board (NAMACB). The subcommittee jumped right into creating and beta testing the Ayurvedic Practitioner exam, which we expect to launch in April 2018 when we will then grandfather all current AP members as Certified Ayurvedic Practitioner awarded by the NAMACB.

The subcommittee was instrumental in establishing the semi-autonomous NAMA Certification Board (NAMACB), which is now in charge of national exams and certification. The NAMACB will start the AD exam creation process in the 2017/2018 cycle and is asks the NAMA Board to support the \$24,000 development with funds set aside for credentialing development. NAMA has created a new position of Credentialing Coordinator and hired Arya Hawkins to fill this role as of July 2017. Arya will work together with the NAMACB in maintaining the national exams and the continuing education requirements for certification.



## GRANDFATHERING SUBCOMMITTEE

**Chair:** Suhas Kshirsagar **Subcommittee Members:** Hilary Garivaltis, Jeff Turner, Bill Dean, Cynthia Copple and Paul Hoffman

This fiscal year the grandfathering for the Ayurvedic Doctor category was approved by the board. The subcommittee has been overseeing the grandfathering process for this category.

## PANCHAKARMA SUBCOMMITTEE

**Chair:** Margrit Mikulis **Subcommittee members:** Allison Bransfield Morse

The Panchakarma subcommittee presented a survey to schools and PK centres to gain understanding of the ways PK is currently being taught and practiced in America. Scope of practice, competencies and guidelines were developed and received approval from the NAMA board.



## AYURVEDIC YOGA THERAPIST SUBCOMMITTEE

**Chair:** Arun Deva **Subcommittee Members:** Karen Dubi, Amy Wheeler, Maria Garre, Anjali Deva, Dhaval Dhru, Jennifer Rioux

With the AYT scope of practice already approved, major achievements of this subcommittee included developing the competencies for the AYT in terms of both yoga education and Ayurvedic education. The required hours of education will gradually increase from 1,100 to 1,500 over a three-year period. A grandfathering process was created to allow individuals to qualify in this category. This will allow for suitably qualified teachers, after which schools will be able to apply for recognition of AYT programs. The subcommittee will oversee the grandfathering application process.



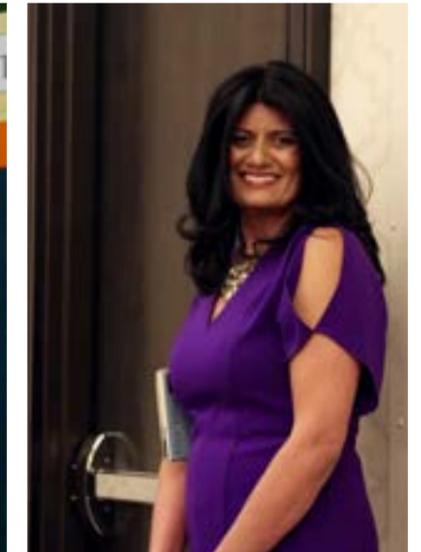
## 2017 Conference Committee

**Conference Manager:** Lisa Boldin **Conference Team:** Emma Pavich, Sponsor and Exhibitor Manager; Arya Early Hawkins, Volunteer Coordinator **Committee Members:** Gwen Nagano, Ellen Leonard, Susan Weis-Bohlen, Dhaval Dhru, Felicia Tomasko

The 2017 Conference, Ayurveda and the Evolution of Modern Medicine, was held April 21-23, 2017 in Chicago, IL. Our 225+ participants had the pleasure of listening to featured presenters Trupti Gokani, MD; Vasant Lad, MASc; Sunil Joshi, BAMS, MD(AYU); and Ram Manohar, BAMS, MD(AYU) speak about how Ayurveda can support modern medicine in the 21st century. Susan Etheridge, Wynn Werner, and Felicia Tomasko shared their insights into "Creating a Strong Legal Foundation for your Practice" and "Marketing Ideas: Tell your Story" to over eighty professional members.

The 2018 Conference Committee is working on our 14th National Conference, Ayurveda for a Healthy World to be held in Dallas/Plano, Texas at the Hilton Dallas/Plano Granite Park from April 20-22, 2018. This year, our conference will be held from Friday through Sunday with an optional Practitioner Forum to be held Friday afternoon and a post-conference international forum on Monday, April 23rd.

# Ayurveda AND THE Evolution of Modern Medicine





# INTERVIEW

## QUESTION & ANSWER

### HILARY GARIVALTIS

Hilary Garivaltis is the Executive Director (ED) of the National Ayurvedic Medical Association. This is a new position as of June 2016 and since its implementation the organization has seen solid growth and development in many key areas. NAMA has been run by a volunteer board for years, which has its limitations in regard to organizational development, so the board's move toward enhancing staff was an enormous shift for NAMA. Not only did the board hire a director, but they expanded hours and staffing across the board.

The ED works closely with the board to ensure the staff and committees stay focused on all initiatives and keep them moving forward. The ED is the glue between the board and the work to be done. Hilary has developed a strong staff and implemented key business strategies and management tools to lay the foundation for organizational growth and stability.

**THE KEY OF SUCCESS  
IS ALWAYS GROW WITH  
PASSION & GOOD IDEAS**



# Q & A

- Q** What are the top 3 most important roles of the NAMA Executive Director?
- A** Maintaining the mission and vision the NAMA Board has set for the organization, listening to the needs of the Ayurvedic schools and professionals while finding ways to best support them in their work and understanding the larger picture of Ayurveda and healthcare in the United States and globally by creating partnerships and sharing Ayurveda.
- Q** In your opinion, what should be the direction of NAMA in shaping the profession of Ayurveda in the U.S.?
- A** I am very proud of the work the NAMA board has done over the course of 17 years. With all their achievements we are now able to place Ayurveda alongside other healthcare professions with integrity. This has been an integral part in shaping the profession of Ayurveda as we continue to move toward our licensing efforts and solidifying our status in the United States.
- Q** Do you feel it is important for our members to get involved with the organization?
- A** Yes, and there are always opportunities throughout the year for members to get involved. Be sure to stay tuned to particular contributions as a member, such as taking our beta tests, providing feedback when a committee sends out a call, voting in annual elections or volunteering at the conference. These are all things we greatly appreciate and will continue to ask our members to be involved with for years to come.
- Q** What is your favorite aspect of the NAMA annual conference?
- A** My favorite part of the NAMA annual conference is sharing with colleagues and getting re-inspired by the speakers. It feels like a family gathering and enriches me for the entire year. I look forward to seeing familiar faces and meeting new people excited about Ayurveda. I always leave with new vigor and commitment to my work in Ayurveda.



# A Letter From Our Treasurer

September 27, 2017

I am honored to serve once again as NAMA's Treasurer. After some years of others holding this position I have now worked for several months with Hilary Garivaltis, NAMA's Executive Director, NAMA's bookkeeper, the President and Secretary to wrap up the past fiscal year's finances and assist with the current fiscal year budget. NAMA's revenue comes principally from membership dues, the annual conference, school program listing fees and credentialing exam fees. Income is recorded in the Your Membership website platform, and expenses are recorded directly in the NAMA checkbook. Income and expenses are entered by hand into Quick Books accounting software by NAMA's bookkeeper.

As of June 30, 2017, NAMA had a net worth of \$174,697, in income and for the past fiscal year ending on June 30, 2017, income of \$331,746 and expenses of \$395,181 resulting in a loss for the year of \$63,434. This fell short of the budget due primarily to a significantly lower than projected income from credentialing due to delays in rolling out professional national exams. As a nonprofit corporation, NAMA pays no corporate taxes federal or local but is required to file a federal IRS 990 and California form 199 tax return every year. The Board of Directors retains an accounting firm in Santa Cruz, CA Peak Accounting, to prepare the tax returns. NAMA is current with all required filing and reporting requirements.

As of the writing of this report, the Executive Committee and the Executive Director are finalizing the budget for July 1, 2017, to June 30, 2018, financial year in preparation for presentation to the Board of Directors for approval. Included in this report are the Balance Statement and Income Statements for July 1, 2016, through June 30, 2017, financial year, and a history of NAMA's income, expenses and net worth.

Respectfully Submitted,

Wynn Werner, NAMA Treasurer,  
Member, Board of Directors



# Balance Sheet

Current Assets		As of June 30th, 2017
Checking and Savings	1010 Bank of AM Operating 7169	\$111,396
	1030 Bank of Am Confernece 1225	\$379
	1040 Petty Cash	\$58
	1050 Bank of America Savings	\$100,008
	Fixed Assets	\$0
<b>Total Assets</b>		<b>\$211,842</b>
Liabilites and Equity		As of June 30th, 2017
Liabilites	Current Liabilites	
	2010 Accounts Paybles	\$5,895
	2350 Deferred Revenue	\$31,250
	<b>Total Liabilites</b>	<b>\$37,145</b>
Equity		
	3000 Equity	\$238,131
	Net Income	-\$63,434
	<b>Total Equity</b>	<b>\$174,697</b>
<b>Total Liabilites &amp; Equity</b>		<b>\$211,842</b>


**Profit and Loss**
**As of June 30th, 2017**

Ordinary Income/Expense Income		6500 · Conference Exhibitor	
4100 · Contribution Income		6510 · Conf Exhibitor Booth + Banquet	0
4110 · Contr - Indiv/Small Bus	130	6520 · Conf Exhibitor Booth with Meals	0
		6500 · Conference Exhibitor - Other	18,786
<b>Total 4100 · Contribution Income</b>	<b>130</b>	<b>Total 6500 · Conference Exhibitor</b>	<b>18,786</b>
5100 · Program Service Fees		6600 · Conference Income Other	
5110 · PSF - School Prog Approval	2,955	6610 · Conference Advertisers	272
5130 · PSF - PACE Fees	9,128	6620 · Conference Silent Auction	2,904
5140 · PSF - Professional Forum	3,005	6630 · Conference Income Misc	0
5160 · PSF - Certification	11,750	<b>Total 6600 · Conference Income Other</b>	<b>3,176</b>
5100 · Program Service Fees - Other	0		
<b>Total 5100 · Program Service Fees</b>	<b>26,838</b>	<b>Total 6000 · Conference Income</b>	<b>143,714</b>
5200 · Membership Dues		<b>Total Income</b>	<b>331,746</b>
5220 · Dues - Student	4,350	Expense	
5230 · Dues - General	7,000	7100 · Program Service Expense	
5240 · Dues - Professional	143,200	7130 · PSE - PACE Fees	0
5282 · Dues - Company	11,500	7140 · PSE - Practitioner Forum	0
5284 · Dues - Educational	0	7150 · PSE - NAMA CEU Fees	0
5286 · Dues - Affiliate	0	7170 · Credentialing Expense	84,395
5290 · Refunds	(4,994)	7180 · CR - Graphic Design	1,400
<b>Total 5200 · Membership Dues</b>	<b>161,056</b>	<b>Total 7100 · Program Service Expense</b>	<b>85,795</b>
5310 · Interest	8	7200 · Membership Dues Expense	
6000 · Conference Income		7295 · MDE - Merchant CC Fees	9,077
6005 · Conference Registration		<b>Total 7200 · Membership Dues Expense</b>	<b>9,077</b>
6005 · Conference Registration - Other	78,998	7400 · Payroll and Related	
<b>Total 6005 · Conference Registration</b>	<b>78,998</b>	7410 · Salaries and Wages	
6400 · Conference Sponsorships		7411 · Mgmt - Executive Director	30,240
6410 · CS - Silver	15,055	7412 · Mgmt - Executive Director Bonus	1,456
6420 · CS - Gold	13,569	7421 · Wages Hourly	70,883
6430 · CS - Ojas	5,000	7423 · Wages Hourly Holiday	264
6440 · CS - Platinum	0	7424 · Wages Hourly Bonus	275
6450 · CS - Platinum Plus	7,500	7425 · Wages Hourly PTO	1,047
6460 · CS - Tea	1,630	<b>Total 7410 · Salaries and Wages</b>	<b>104,165</b>
<b>Total 6400 · Conference Sponsorships</b>	<b>42,754</b>		


**Profit and Loss**
**As of June 30th, 2017**

7450 · Payroll Taxes		Total 8200 · Facilities	1,100
7455 · FICA	6,458	8300 · Meetings Fees & Travel	
7456 · Medicare	1,510	8310 · Travel - Staff	13,995
7457 · FUTA	486	8300 · Meetings Fees & Travel - Other	0
7460 · SUTA Taxes		<b>Total 8300 · Meetings Fees &amp; Travel</b>	<b>13,995</b>
7461 · CA SUTA	673	8520 · Insurance	
7462 · MA SUTA	128	8522 · Ins - General Liability	669
7463 · ME SUTA	(223)	8524 · Ins - D&O	1,864
7464 · NC SUTA	340	8526 · Ins - Workers Comp	883
7466 · NM SUTA	23	<b>Total 8520 · Insurance</b>	<b>3,416</b>
7460 · SUTA Taxes/Other	0	8540 · Development	
<b>Total 7460 · SUTA Taxes</b>	<b>942</b>	8541 · Staff Development	0
<b>Total 7450 · Payroll Taxes</b>	<b>9,397</b>	8544 · Volunteer Development	0
<b>Total 7400 · Payroll and Related</b>	<b>113,561</b>	<b>Total 8540 · Development</b>	<b>0</b>
7500 · Professional Fees		8560 · Outside Computer Services	
7520 · Accounting Fees	9,396	8565 · Information Technology-Hosting	411
7530 · Legal Fees	3,090	8562 · Information Technology - YM	7,909
7535 · Exam Administration Fees	0	8569 · Information Technology - Other	144
7536 · Exam Development Fee	0	<b>Total 8560 · Outside Computer Services</b>	<b>8,464</b>
7537 · Credentialing Governance Fees	0	8570 · Advertising	
7540 · Consulting	5,160	8571 · Adv - Publications	0
7550 · Payroll Processing Fees	5,526	8573 · Adv - Graphic Designs	0
<b>Total 7500 · Professional Fees</b>	<b>23,172</b>	<b>Total 8570 · Advertising</b>	<b>0</b>
8100 · General & Administrative		8590 · Miscellaneous Expense	0WW
8110 · Supplies	1,261	8610 · Bad Debt Expense	0
8120 · Trademark	1,350	8650 · Business Taxes	(99)
8130 · Telephone and Internet	3,949	9000 · Conference Related Expenses	
8140 · Postage & Shipping	1,571	9009 · Conference Advertising	
8160 · Dues and Memberships	279	9010 · CA - Journals and Magazines	602
8170 · Printing & Copying	655	9020 · CA - Other (local)	0
8190 · Cash Short / Over	1,344	<b>Total 9009 · Conference Advertising</b>	<b>602</b>
<b>Total 8100 · General &amp; Administrative</b>	<b>10,408</b>		
8200 · Facilities			
8210 · Rent, Parking, Occupancy	0		
8215 · Employee Home Office	1,100		



## Profit and Loss

As of June 30th, 2017

9110 · CE - Postage & Shipping	135	9860 · Conference Office Supplies	501
9200 · Conference Printing		9890 · Conference Misc	480
9210 · CP - Graphic Design	2,875		
9220 · CP - Posters	0	Total 9800 · Conference Expense Other	6,777
9230 · CP - Conf Prog Guide	0		
9260 · CP - Packets	2,501	Total 9000 · Conference Related Expenses	126,292
9280 · CP - Signage and Banners	149		
		Total Expense	395,181
Total 9200 · Conference Printing	5,525	Net Ordinary Income	(63,434)
9400 · Conference Hotel Expense			
9410 · CH - Food & Beverage - Contract	87,268	Net Income	(63,434)
9420 · CH - Food & Beverage - Overages	0		
9480 · CH - Other (Including Security)	0		
Total 9400 · Conference Hotel Expense	87,268		
9500 · Conference Equipment			
9510 · CE - Audio Visual	359		
Total 9500 · Conference Equipment	359		
9600 · Conference Presenter			
9610 · CP - Keynote Honorariums	4,000		
9622 · CP - VIP Fees for Lodging	0		
9624 · CP - VIP Fees for Food	0		
9660 · CP - Entertainment Fees	600		
Total 9600 · Conference Presenter	4,600		
9700 · Conference Management Expense			
9710 · Conference Management	19,289		
9714 · CM - Internships	0		
9716 · CM - Volunteer Expenses	276		
9720 · CM - Travel Expenses	1,461		
9724 · CM - Meal Expense	0		
Total 9700 · Conference Man/Expense	21,026		
9800 · Conference Expense Other			
9830 · Conference Photography	0		
9844 · Conference Bank Svc Chrgs	180		
9846 · Conference Merchant CC Fees	5,616		



## Secretary's Report

It is an understatement to say that it has been a great honor to serve as NAMA's Secretary. As I begin my third term, I continue to be inspired by the growth of the organization and feel an incredible motivation to participate in the ongoing initiatives we continue to develop for the Ayurvedic professional in the United States.

As Secretary, I ensure that all required records of the National Ayurvedic Medical Association are up-to-date and filed as appropriate to maintain the organization's status as a 501(c)(6) non-profit California Corporation. Additionally, I oversee that our bi-annual filing of continuing operations as a California corporation is submitted promptly.

I look forward to this next term as your Secretary and feel confident that our organization is growing, thriving and innovating for all of you.

Yours in Service,  
Dr. Margrit Mikulis, ND

## It takes many hands to make NAMA happen! A special thanks to our whole team.....

Ala Sudol	Eric Grasser	Kristen Schneider	Renee Auriemma
Alakananda Ma	Felicia Tomasko	Larry Mangel	Rosy Mann
Allison Bransfield Morse	Gwen Nagano	Lisa Boldin	S.Prasad Vinjamury
Amy Wheeler	Heather Baines	Lucy Lyudmyla Vasylenko	Sudhir Singh
Anjali Deva	Heather Grzych	Luren Sauer	Suhas Kshirsagar
Anusha Sehgal	Hilary Garivaltis	Manjusha Vinjamury,	Susan Etheridge
Anupama Kizhakkeveetill	Jackie Rae Richard	Maria de Sousa	Susan Weis-Bohlen
Arya Early Hawkins	Jasmine Grace	Maria Garre	Tesia Love
Arun Deva	Jay Apte	Margrit Mikulis	Tricia Sletten
Betsy Quarles	Jayarajan Kodikannath	Minta Davis	Tracy Zuschlag
Cynthia Copple	Jeff Turner	Monica Groover	Vishnu Aragona
Danica Lynch	Jenny Griffith	Mona Bhatt	
Daniel Seltz	John Matthews	Nicole Taylor	
Devi Mueller	Julie Wardwell	Niketa Joshi	
Dhaval Dhru	Kathy Jo Staheli	Om Kailas	
Diana Lurie	Katie Castellanos	Parla Jayagopal	
Ellen Leonard	Katie Ziem	Paul Hoffman	
Emma Lewis	Karen Dubi	Raven Townsend	
Emma Pavich	KP Khalsa	Rebecca Caudill	

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2016-2017

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# THANK YOU MEMBERS!

WE WILL SEE YOU NEXT YEAR

