



ANNUAL REPORT December 2020

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Overview and milestones achieved during 2020

Despite major obstacles created by the COVID-19 pandemic, mostly related to travel restrictions and lockdowns, ACHENA was able to adapt relatively well since it was already a virtual organization. With the guiding resources of ASPA, ACHENA made appropriate policy revisions, such as fully virtual site visits and flexible timelines that accommodated challenges faced by homeopathic schools resulting from the pandemic. During 2020, ACHENA welcomed one additional school into the family of accredited schools, and two other schools moved closer to accreditation status, making a total of 8 schools on the accreditation track.

Here were some of ACHENA’s major accomplishments during 2020:

- The Site Visit and accreditation of Academy of Homeopathy Education (AHE, the fifth accredited school)

- Review of the Self-Study Report and Site Visit of the International Academy of Classical Homeopathy (IACH-North America)
- Review of the Self-Study Report of the British Institute of Homeopathy (BIH)
- A successful fundraising venture with Whole Health Now
- A workshop on the financial benefits of accreditation for homeopathic schools that was piloted with the CHC
- Development of several informational videos prepared for the JAHC as a part of the strategy to increase awareness within the homeopathic community about the value of educational accreditation
- Continued active participation in, and financial support of, homeopathy advocacy through the Homeopathy Consumer Council and Advocacy Working Group for Homeopathy

Human resources

The sustained deficit of Commissioners, Committee members and Peer Reviewers continues to be the single greatest challenge facing ACHENA, increasing the workload of those who serve as Volunteers.

Commissioners

In early 2020, Mary Whitaker, ACHENA Secretary, and Bharti Gupta, Treasurer, completed their 3-year terms but did not renew for a second term. Commissioner Deborah Phelps took on the important role of Secretary following Mary's departure.

Michael Schanz was welcomed as a new public-member Commissioner and valued advisor to the Executive Committee.

In September, Alastair Gray stepped down as President but remained on the Board and continued to advise the Executive Committee. Anna Vakil (Vice-President) moved in as Acting President and was later elected President, and Cynthia Chrisman assumed the role of Acting Vice-President, elected later to this position as well.

Advisors

Deb Fox, a homeopath and former accountant, provided important accounting and bookkeeping services as an ACHENA Advisor, as well as vital review of school accreditation-related financial documents. Venkat Venkataramanujam assisted with contract preparation as well as IT.

Staff

A thorough job analysis was undertaken of the hours, duties and contract expenses of the Executive Administrator, in preparation for the planned departure of Carli Auer and to aid in the budgeting process for her replacement. At the end of 2020, Amanda Kacuba was hired and welcomed as the new Administrator. Thanks to Carli for her years of dedicated service, essential to the development of ACHENA!

Executive Committee

The following initiatives were completed by the Executive Committee:

- The adoption of several new conflict of interest and confidentiality policies and revised disclosure documents as well as a whistleblower policy
- New: *Operations Manual* to guide all internal policies and procedures
- New: Annual dues approved effective July 1
- New: Substantive Change fees approved to be effective January 1, 2021
- Multiple revisions to ACHENA's *Policies and Procedures* (accreditation) with input from the homeopathic schools
- Multiple revisions to the *ACHENA By-laws*
- Major revisions to the Eligibility Packet and Review Guidelines, Self-Study Guide/Report Template and development of a Self-Study Report Assessment Rubric
- New manuals for use with site visits: Site Visit Manual for School Administrators, Site Visit Manual for Peer Reviewers
- New: Volunteer Manual, Volunteer Orientation workshop (for all new Volunteers) and Commissioner Orientation workshop (specifically for new Commissioners)
- Major revisions to the Eligibility Workshop, Self-Study/Site Visit Workshop for homeopathic schools
- New: Contractor Handbook and Contract Agreement for all contractors
- New: Outline for Staff training

Nominations and outreach

Led by Cynthia Chrisman with the able assistance of Kala Ramasubramanian and support of Deborah Phelps, the Nominations and Outreach Committee designed and developed a newsletter, launched the ACHENA Facebook page and updated ACHENA's website with a special focus on community engagement: 1) FAQs to address accreditation misconceptions, transparency and conflicts of interest; and 2) "Get Involved"/"Call for Volunteers". The Committee successfully recruited the new Commissioner and the two new Advisors.

Finance

Conference travel expenses were lower during 2020 due to the pandemic, though contract service expenses were higher. On the revenue side, ACHENA adopted a general strategy in 2020 to raise dues and fees in stages until they are commensurate with those levied by other accrediting agencies. To this end, Annual Dues and Substantive Change fees were raised, although this will not affect revenue until 2021.

CPD

This Committee, chaired by the Executive Administrator and assisted by Parker Pracjek and Deborah Phelps, approved several new courses and course renewals:

Total CPD Events approved in 2020: 45

Total CPD hours in 2020: 418.75

Standards

The Standards Committee, chaired by Parker Pracjek and assisted at various times by the Executive Administrator, Alastair Gray, Cynthia Chrisman, Michael Schanz and Kala Ramasubramanian, led a review of high-priority changes to accreditation standards. Standard 2 (Legal organization) was revised for the purpose of clarifying legal status for both foreign and domestic schools, with input from the accredited schools as well as public comment. Approval of this revision will be finalized in early 2021.

The Committee initiated a review of Standard 6 (Admissions) with the aim of laying the foundation for transfer of credits and future operating agreements between the smaller non-accredited schools and ACHENA-accredited schools. A review of Standard 11 (Physical facilities) was also initiated in order to better acknowledge infrastructure and other requirements associated with distance learning. Both these revisions will continue to move forward in 2021 and will include input from the schools as well as public comment.

Special projects

USED Petition: This project was put on hold indefinitely due to the revelation early in the year that the USED was not accepting new petitions until at least July. Later in the year, ASPA advised to wait further until February or March of 2021 following the presidential election. Notwithstanding this disappointing delay, ACHENA forged ahead with the preparations needed to meet the USED requirements, and by the end of 2020 had completed nearly all of them.

7-year Review of *Standards and Competencies for the Professional Homeopathic Practitioner in North America*: A review and revision of this document was launched as a joint project with the CHC in October, with Alastair Gray leading the initiative. By the end of 2020, the Steering Committee, terms of reference, three working groups and a project timeline were defined for this project.

Looking ahead to 2021

Volunteer recruitment and human resource development will be the top priority in 2021 for ACHENA. The organization needs additional human resources not only to carry out its day-to-day work as an accrediting agency and overseer of courses for continuing professional development, but in order to broaden and deepen its vital role as one of the pillar agencies of the national homeopathic community.

Here is some of the work that lies ahead:

- The final accreditation decision will be made for both IACH and BIH in early 2021, along with in-person Site Visits as a required follow-up to the virtual Site Visits
- It is anticipated that during 2021 a Letter of Intent will be submitted to the USED along with subsequent tasks previously planned in association with management of this project

- ACHENA will continue presenting its workshop on the financial benefits of accreditation to both the accredited and non-accredited schools
- The Standards Committee plans to conduct a review of several other standards during 2021
- The Standards and Competencies Review project Steering Committee intends to carry out the planned revision process, with the document finalized by the end of 2021.
- ACHENA will continue working with the CHC in devising a pathway to certification for homeopaths trained at non-accredited schools before 2019.
- An Ad Hoc committee will re-structure the school Annual Report template, devise guidelines for reviewing the report, and design special training to assist the schools in completing it
- The CPD program, which is a revenue-generator for ACHENA, needs further development, including the revision and streamlining of the CPD application for greater ease of completion by course providers
- In the fall of 2021, ACHENA will develop the next 3-Year Strategic Plan (2022-2024).

ACHENA Profit and Loss Statement for the year ended December 31, 2020

	ACHENA Profit & Loss Year Ending December 31, 2020	ACHENA Profit & Loss Year Ending December 31, 2019	Change	Projected 2021
Income	26049	22458	3591	20000
Paypal	458	449	9	450
Contract services	11885	9500	2385	5200
Dues	5540	8348	-2808	6000
Liability insurance	1551		1551	1551
Travel/meetings	2268	4345	-2077	2500
Internet	1412	157	1255	1500
Public relations	300		300	
O/S Consulting	480		480	
Fees & other misc	192	3088	-2896	150
Consulting fees	550		550	2500
Total expenses	24636	25887	-1251	19851
Net Income (Loss)	1413	-3429	4842	149

	Balance Sheet as of December 31, 2020	
Cash	9292	(Restricted 7500)
Paypal balance	587	
Airline credit (no expiration)	383	
Total Assets	10262	
Accounts payable	550	
Liabilities 1/1/2020	8299	(Restricted 7500)
Net Income (Loss)	1413	
Total liabilities & equity	10262	

Projected income 2021	
Annual sustaining dues	13873
CPD Fees	6000
Total	19873