



RESIDENT & FELLOW SECTION  
DELEGATION GUIDE  
INTERIM 2024

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## Acknowledgements

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*We additionally wish to acknowledge the work of previous and current medical student, resident, and fellow leaders who have contributed to the language or content used in this guide, including:*

*Adam Levine, MSS Delegate 2004-05  
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Justin Magrath, MSS Alt Delegate 2020-21  
Anna Heffron, MSS Delegate 2021-22, RFS Delegate 2023-24  
Tristan Mackey, MSS Alt Delegate 2021-22*

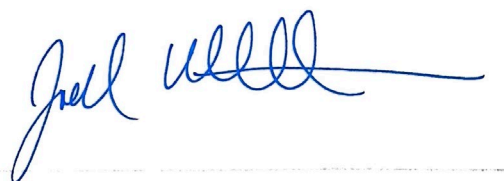
# Hello & Welcome!

Welcome to the Delegation Guide, on behalf of the AMA Resident & Fellow Section (RFS) Governing Council and RFS Caucus!

If you are new to the AMA or a first-time Delegate or reviewer, we recommend reading Appendix I first, then reading each section as you arrive at that stage of resolution review or HOD. Of course, please read this guide however is most useful to you.

Our goal is to give you a user-friendly guide to the resolution process. **This guide is intended for RFS Sectional Delegates and Alternate Delegates, please do not share this resource outside the Section.** Please reach out with any questions, concerns, or feedback to make future iterations of this guide more helpful.

Sincerely,

A handwritten signature in blue ink that reads "Joey Whelihan". The signature is fluid and cursive, with a long horizontal stroke extending to the right.

Joey Whelihan, MD  
RFS Section Delegate 2024-25  
joeywhelihan48@gmail.com

A handwritten signature in black ink that reads "Tristan Mackey". The signature is cursive and elegant, with a long horizontal stroke extending to the right.

Tristan Mackey, MD  
RFS Section Alt Delegate 2024-25  
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## PART I: Composition of the RFS Delegation

The RFS Delegation is co-chaired by the RFS Section Delegate and the RFS Section Alternate Delegate and is composed of [35 Sectional Delegates \(SDs\)](#) and [35 Sectional Alternate Delegates \(ADs\)](#). *We know the very similar terminology can get confusing. If it helps, you can remember that there are more letters in “Sectional,” like there are many more Sectional Delegates than there are Section Delegates.*

The RFS Section Delegate and Alternate Section Delegate are elected at every Annual meeting (June) and are members of the [RFS Governing Council \(GC\)](#). They serve year-long terms. The RFS SDs and ADs are elected at every Interim meeting (November) and serve year-long terms.

THE RFS DELEGATION	
RFS Section Delegate RFS Section Alternate Delegate ~AKA~ The RFS Section Delegates	RFS Sectional Delegates RFS Sectional Alternate Delegates ~AKA~ The RFS Sectional Delegates
1 Section Delegate 1 Section Alt Delegate  Elected every Annual meeting by the RFS Assembly for a year-long term  Co-chair the RFS Delegation	35 Sectional Delegates 35 Sectional Alt Delegates  Elected every Interim meeting by the RFS Assembly for a year-long term  Must be endorsed by a state or specialty society

There is also an RFS member on each of the 7 [AMA Councils](#). Some of these Councilors are also RFS SDs/ADs.

## PART II: RFS Sectional Delegate and Alternate Sectional Delegate Responsibilities

### **Overview**

Although Sectional Delegates (SDs) and Sectional Alternate Delegates (ADs) wear differently colored ribbons at in-person meetings, and SDs are seated first when the House is in session, **the two positions are essentially identical in all other respects.** SDs and ADs receive equivalent assignments for resolution review, and occupants of either position can serve as Reference Committee Team Leads (RefCom Team Leads). With the approval of the Section Delegates, SDs and ADs alike are expected to volunteer to draft and give testimony for the House of Delegates (HOD) Online Reference Committee (ORC), HOD in-person Reference Committee (RefCom) hearings, and in the House of Delegates Business Sessions.

**SDs and ADs are expected to attend the Annual and the Interim AMA House of Delegates meetings and stay for the entire duration of each meeting.** If their schedule permits, SDs and ADs are encouraged to attend the RFS Assembly before each meeting (typically the Friday preceding the House of Delegates meeting). At this meeting, you will participate in forming the RFS' internal and external policies. Early and persistent planning is essential to secure permission from your program, so be sure to plan ahead. Absence request processes should be initiated as soon as possible after your election. Please refer to Appendix II for further guidance.

**SDs/ADs are expected to keep up with all emails** sent out by the RFS Delegate, RFS Alternate Delegate, and RFS Staff. Periodically, the RFS Delegate and RFS Alternate Delegate may request specific information. Please reply to these by the given deadline. We acknowledge that training is busy, but this is a minimum expectation of your elected role.

Per RFS IOPs Section VIII.C.3, RFS Sectional Delegates and Alternate Delegates shall not speak on behalf of the RFS unless first permitted to do so **by the RFS Delegate or Alternate Delegate.** Doing this would violate our IOPs and could lead to removal from the Delegation.

Other RFS members may help with resolution review, drafting, and testimony provision. RFS Councilors, RFS Standing Committee members, or RFS members who are HOD Delegate or Alternate Delegate for their state or specialty society may participate in this process with the permission of the Section Delegate.

### **HOD Handbook Review and the Online Reference Committee**

Approximately four to six weeks before the HOD (~early October for Interim and ~early May for Annual), the RFS Delegate and RFS Alternate Delegate will contact the SDs/ADs to provide an HOD timeline and solicit volunteers to serve as RefCom Team Leads. SDs and ADs can indicate their preferred RefCom team assignment at that time.

#### **REFCOM TEAM LEADS**

**RefCom Team Leads are leaders within the RFS Delegation who serve primarily as administrators/coordinators for the RefCom they lead.** RefCom Team Leads are responsible for assigning resolution review assignments among SDs/ADs on their team and ensuring review deadlines are met. During RFS Caucus meetings, the team leads are the point people for resolutions within their RefCom, leading the Caucus discussion for these items. Team leads are also expected to assist the Section Delegates in assigning testimony, ensuring it is completed, and coordinating its provision for the HOD Online Reference Committee, live RefCom hearings, and the HOD Business meeting.

RefCom Team Leads can expect to spend additional time coordinating testimony, reviews, and personnel management for their RefCom.

If you are a **first-time Team Lead**, see **Appendix IV** for expectations, best practices, and more to orient you to the role.

After this, the Section Delegates will announce RefCom team assignments. Section Delegates will assign resolutions to each reviewer on that RefCom team. RefCom Team Leads will help supervise and coordinate these reviews.

**Deadlines for resolution review assignments typically have tight turnarounds. Please plan accordingly and maintain close communication with your RefCom Team Leads and Section Delegates as conflicts arise.**

**The biggest tasks at this stage are (1) assigning a priority, and (2) determining the RFS position on the item.** You will determine this by reviewing the following:

- [RFS Position Compendium](#)
- [Relevant AMA Policy](#)

**\*NEW\*** Prioritization Matrix

Tiers	Inclusion Criteria	Meaning
<p><b>Priority 1</b></p>	<ul style="list-style-type: none"> <li>● All RFS-authored resolutions, co-sponsored resolutions, and reports that were generated from RFS-authored resolutions</li> <li>● Items which will <b><u>profoundly, specifically and directly</u></b> affect trainees</li> </ul>	<ul style="list-style-type: none"> <li>● RFS Delegates directly involved in advocacy</li> <li>● Will actively garner support, build coalitions, and stifle opposition</li> <li>● Will give testimony at RefCom and HOD</li> </ul>
<p><b>Priority 2</b></p>	<ul style="list-style-type: none"> <li>● Items which address one of the five RFS Strategic Focus Areas:               <ul style="list-style-type: none"> <li>○ Justice, Equity, Diversity, and Inclusion</li> <li>○ Scope of Practice</li> <li>○ Trainee Rights, Wellbeing, and Burnout</li> <li>○ Medical Education</li> <li>○ Healthcare Access and Coverage</li> </ul> </li> <li>● Items which will <b><u>specifically and directly</u></b> affect trainees</li> </ul>	<ul style="list-style-type: none"> <li>● RFS RefCom Team Leads directly involved in advocacy</li> <li>● Will actively support by giving testimony at RefCom (online and/or in person)</li> <li>● +/- HOD testimony</li> </ul>
<p><b>Priority 3</b></p>	<ul style="list-style-type: none"> <li>● All other items</li> </ul>	<ul style="list-style-type: none"> <li>● Will not give testimony on these items</li> <li>● HOD vote (if needed) depends on stance (see below)</li> </ul>



**\*NEW\*** RFS Stance Matrix

<b>Support</b>	RFS Position Compendium <u>clearly and directly supports</u> the item’s resolved clause(s).
<b>Oppose</b>	RFS Position Compendium <u>clearly and directly opposes</u> the item’s resolved clause(s).
<b>Watch</b>	<p>The RFS does not have a clear position on the item, but:</p> <ul style="list-style-type: none"> <li>● it involves the strategic focus areas (see below) OR, <ul style="list-style-type: none"> <li>○ Justice, Equity, Diversity, and Inclusion</li> <li>○ Scope of Practice</li> <li>○ Trainee Rights, Wellbeing, and Burnout</li> <li>○ Medical Education</li> <li>○ Healthcare Access and Coverage</li> </ul> </li> <li>● it directly involves trainees</li> </ul> <p><b>OR</b></p> <p>The RFS <u>does</u> have a clear position but as a matter of strategy, we want to see how the discussion unfolds before taking a stance</p>
<b>*Amend</b>	<p>The RFS may support/oppose the item based on our Position Compendium, but would like to offer an amendment to make it more in-line with our position.</p> <p>*Talk to your RefCom Team Leads prior to assigning this Stance</p>
<b>*Refer</b>	<p>The RFS may support/oppose the item based off of our Position Compendium, but as a matter of strategy would like to move to refer the item.</p> <p>*Talk to your RefCom Team Leads prior to assigning this Stance</p>
<b>No Position</b>	All other items. <b>This will be the majority of items.</b>

**\*NEW\*** \*Caucus Votes\*

If it is unclear whether the RFS Position Compendium directly addresses the item's ask, but our interests are sufficiently affected to justify a public stance from the RFS, then a caucus discussion and vote can be held to determine our stance (this process is elaborated below).

**"Caucus Vote" will no longer be a "Stance" for the Brick.**

**\*Note on Reviewing\***

It can be tempting to let your *personal beliefs or interests* influence your assignment of the priority and/or RFS stance. Please do your best to set those aside while reviewing. Your reviews and stance/priority designations should be **solely based** on the existing RFS Positions.

**Online Reference Committees \*NEW\***

Per the adoption of the recommendations from the Resolution Modernization Task Force, the **Online Reference Committees (ORC)** will open approximately 2 months prior to the meeting. They will remain **open for 3 weeks** after which the **Preliminary Reference Committee Reports** will be developed by the reference committees. All AMA members may comment on the ORC.

There is no limit on length of comments and that supplemental material may be added. However, please limit the addition of large files or photos. Please use a hyperlink where possible. Discussion of potential policy that may be reaffirmed in lieu of a given resolution will occur on the ORC.

The RFS Section Delegates will attempt to attend your team-specific calls to provide additional guidance in assigning items to the above categories. A Team Lead call will be held before the close of the Online Reference Committee (ORC) and before the in-person meeting to finalize RFS stances. All testimony you create for the items you review should be written or copied into the testimony documents linked on the *RFS Brick*.

**Posting Testimony on the ORC \*NEW\***

Each comment on the ORC should include IN ALL CAPS at the start of your post within the comment box:

- Name
- All appropriate roles (e.g. author, HOD Delegate or Alternate from X Delegation, Section Member, Council Member, etc.)

- For whom you are speaking (on behalf of yourself or your group)

Any posts that are not appropriately identified will be removed.

### The RFS Brick

The RFS Brick is a Google Sheet that outlines all business items for the HOD meeting. Since our caucus is large, this is a way to streamline communication among all individuals. All your assigned tasks will be completed in the Brick. Please place your prioritization, stance, comments, and testimony in the Brick. The Brick is used across all stages of the policy-making process. You will be sent a link to the Brick before the opening of the VRC.

**Importantly, the Brick is an INTERNAL document -  
it should never be shared outside the RFS!**

### Historical Note

*Ever wondered why the Brick is called “the Brick”? Before we moved online, all relevant documents, including all resolutions and reports, would be physically printed on paper and distributed. This took up a lot of paper and was heavy, hence called “the brick.” We moved online for environmental friendliness, ease of use, and better communication; the online version is sometimes called the “microbrick” given its smaller physical impact. You will still see some physical paper copies of “the brick” at meetings—you can use or not use them as you please.*

### RFS Caucus Meetings

SDs and ADs comprise the RFS Caucus, of which the Chair and Vice Chair are the RFS Section Delegate and RFS Alternate Section Delegate (also known as the Section Delegates), respectively. These trainees are joined in RFS Caucus meetings by trainee members of state delegations, trainee members of specialty society delegations, Councilors, and all other RFS members interested in attending. **However, only the Section Delegates, SDs, and ADs may cast votes during RFS Caucus meetings.** The Section Delegates have the authority to declare a Caucus meeting closed to non-members of the delegation at any time. **SDs and ADs should attend all RFS Caucus meetings; if you must miss a Caucus meeting, you should inform the Section Delegates you will be absent.**

Though SDs are elected by the RFS Assembly, SDs sit with their endorsing delegations at the House of Delegates Business Meetings. **When permitted by the endorsing society, SDs/ADs are**

**expected to attend all their endorsing state/society caucuses during the HOD pursuant to RFS IOPs Section VII.C.2.** It is crucial that SDs/ADs take these opportunities to learn where those delegations stand on items of interest to the RFS, and when appropriate, express the RFS standpoint. *If your endorsing society hasn't sent you an invite to their caucuses, reach out to your delegation leadership—they may have just left you off an email.* Endorsing societies are usually very happy to have their Sectional Delegates closely involved in delegation proceedings!

### Voting During RFS Caucus

A quorum, defined as 50% + 1 of the RFS Caucus per RFS IOPs Section XIII.E.2, is required for votes at RFS Caucus meetings. When a resolution is before the AMA HOD *for which no RFS position exists*, any member of the RFS Delegation may move that the RFS take a position on the resolution. Such a movement requires a second by another delegation member and a **simple majority vote to pass** per RFS IOPs Section XIII.E.2. **\*NEW\*** In select circumstances, the Section Delegates may also elect to take a caucus vote via an electronic mechanism, such as via Google Forms or GroupMe assuming we receive enough votes to establish quorum.

Typically, Caucus Votes are reserved for items for which it is important that the RFS weighs on publicly. Essentially, this means that an item should be a priority 1 or a priority 2. We may vote on a priority 3 if one of these items becomes strategically important to us or if an ally has asked us to consider that resolution.

### HOD Reference Committee Hearings

Reference Committee hearings are typically held over the weekend (Saturday and Sunday) before the HOD Business meetings. Please see the Speakers' Letters for the meeting to see the agenda for each particular meeting. SDs/ADs are expected to attend their corresponding RefComs. With permission from and in coordination with their RefCom's Team Leads, SDs/ADs may post their written testimony in RefComs and may also be assigned additional tasks by Team Leads and by their own endorsing societies. Team Leads should have preparatory meetings or communications with their RefCom Teams before the RefCom hearing to coordinate who will be giving which testimony, who will be taking notes, and who will be available to coordinate last-minute needs for the team.

**It is crucial to monitor the RefCom's order of business to ensure that team members are present and prepared to go to the microphones to give testimony on our priority items.** At times, snap decisions regarding testimony must be made. RFS positions should not be changed during the RefCom hearings, but Team Leads may need to coordinate rebuttals or responses to potential amendments in real-time during the hearing. *Team members should not testify in rebuttals or in response to proposed amendments without coordinating with their Team Leads,*

and Team Leads should loop in the Section Delegates about rebuttals and amendments as close to real-time as possible. Team Leads have the back-up of pulling in a Section Delegate whenever a priority item appears to be struggling.

The Team Leads are responsible for ensuring minutes are being recorded, RFS members are ready to testify when necessary, and communicating any surprises or changes to the Section Delegates (who cannot be physically present in each RefCom meeting simultaneously). Of note, **it is extremely important that coherent minutes are taken of RefCom testimony**, particularly for priority items. These minutes are used to help us coordinate with allies and reach out to objectors to discuss any concerns they have about our items.

Per RFS IOPs Section VIII.C.3, RFS Sectional Delegates and Alternate Sectional Delegates shall not speak on behalf of the RFS unless first permitted to do so by the RFS Delegate or Alternate Delegate. Doing so would violate our IOPs and could lead to removal from the Delegation.

### **HOD Business Sessions**

The Section Delegates and Team Leads will assign SDs/ADs to draft and provide testimony in the HOD. Unlike RefCom hearings, at which any AMA member can testify, only credentialed Delegates or Alternate Delegates displaying a salmon badge card (a salmon-colored piece of paper carried in an ID badge that indicates the carrier is currently acting as the voting member in that seat) identifying the Delegate they are replacing may testify in the HOD. However, all votes in the House are taken under the guidance of AMA Bylaws 2.0.1.2, which instructs Delegates that responsible voting should carry in mind multiple factors, including your multiple delegations' positions and priorities, advocacy for patients and public health, your sponsoring organization(s) and your constituents.

#### **\*Note on HOD Business Session Attendance\***

**You are the voice and vote of the RFS.** If you are not present for votes that happen at the HOD Business Sessions and Elections, then you are disenfranchising the trainee voice in the AMA. You were elected to the SD/AD position to represent trainees at the level of the AMA, so **if you need to be absent from the HOD Business/Election sessions for any reason, or you need to leave (bathroom, food, etc.), please find an AD to swap out for you.** The Section Delegates can assist with this and will delineate a process for swaps as the meeting approaches.

### **Alternate Delegates and Substitutions**

1) **ADs should be prepared to step in at ANY TIME** for SDs during the HOD business sessions.

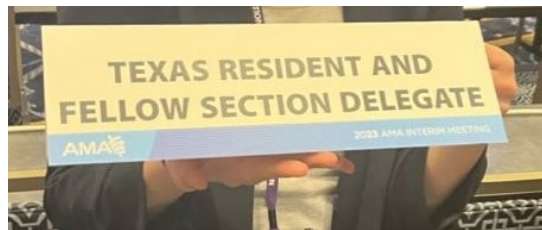
When an SD is absent or needs to step out, the AD is expected to sit with the **same delegation** as the SD they are replacing (RFS IOPs Section VIII.D.2), even if the AD is from a different delegation. You can explain to the delegation members sitting around you that you are filling in for their RFS Sectional Delegate. *We don't expect anyone will give you trouble about this—since this is how RFS Sectional Delegates have functioned for a very long time—but if they do, text the Section Delegates!*

- 2) Crucially, the RFS Delegates will attempt to maintain a full complement of 35 SDs and 35 ADs for the duration of the HOD. This becomes increasingly difficult as the meeting continues, as some SDs/ADs cannot stay for the entire meeting. **As SDs/ADs leave, the Section Delegates and staff will re-credential other available trainees to keep the delegation filled.** The first priority is ensuring that the 35 SD slots are filled, and ADs will be moved into SD spots accordingly as needed. AD vacancies thus created will be filled by other available RFS members as able.

## FAQs

### **Q: Someone is sitting in my seat... what do I do?**

First, ensure that it is the correct seat. All RFS Sectional Delegate seats should have a placard in front of them that looks like this:



Specifically, it should say “Resident and Fellow Section Delegate” preceded by your endorsing group.

A common situation occurs when there is a trainee member of a group; for example, let's say, the American Academy of Pediatrics. The AAP has, for example, 10 delegates. 7 of them are attendings, 1 is a fellow, and 2 are RFS-endorsed Sectional Delegates. The fellow would have to sit in front of an American Academy of Pediatrics placard and **NOT** the “Resident and Fellow Section Delegate” placards, which are **solely reserved for RFS-elected RFS Sectional SDs and ADs.**

*Second*, if someone in your seat will not move, please contact the RFS Section Delegates ASAP. They will work with AMA Staff to resolve the issue. This is crucial to ensuring our elected Delegates are voting in the spots to which our RFS elected them!

During all times, please conduct yourself with respect, kindness, and integrity (which we will use as our internal definition of “professionalism”).

## PART III: Giving Effective and Compelling Testimony

As Sectional Delegates and Alternates, you will have many opportunities to give testimony, both within Reference Committees and on the floor of the AMA House of Delegates. The suggestions below are specific to giving testimony in RefCom hearings, but many of them will also apply to testimony given at the HOD itself. **Testimony at RefCom is especially important since a favorable RefCom report makes it much, much easier to get a resolution adopted by the AMA**, and an unfavorable report places us in a far more difficult starting place for the HOD. Your goal is to ensure that resolutions we support are recommended by the RefCom for adoption and resolutions we oppose are recommended by the RefCom for not adoption.

The testimony you give on behalf of the RFS will be approved by the Team Leads and Section Delegates. The keys to effective testimony are being confident, giving a brief background, keeping it concise (usually no more than 3 arguments long), and rehearsing it. RFS testimony will be in the following format:

1. “Thank you, Dr. Chair.”
2. “[Name], speaking on behalf of the Resident and Fellow Section [in support of/opposition to/with an amendment for] this resolution.”
3. Brief summary of the issue.
4. List arguments for support of/opposition to the resolution—*best practice is to limit to 3 arguments*.
5. Finish with a reiteration of your stance, and thank the reference committee for their consideration.

As an SD/AD, you may give testimony as an individual, but you must say that you are *speaking on behalf of yourself*, and you may not say that you are speaking on behalf of trainees unless given explicit permission to do so by the Section Delegates. Your Section Delegates would strongly discourage you from identifying yourself as a trainee in these situations and would encourage you to notify the Team Lead for the RefCom and the Section Delegates well in advance if you plan to give individual testimony.

Written testimony posted on the online forum that takes place before the in-person meeting follows similar guidelines as spoken testimony with a few important differences. **Written testimony is a great place to go more heavily into facts and figures**—and it is alright to include more arguments in written testimony than you might in spoken testimony. Facts, figures, and references included in this written testimony will be more easily available to the Reference Committee as they are making their decisions—so include all your additional references and papers there!



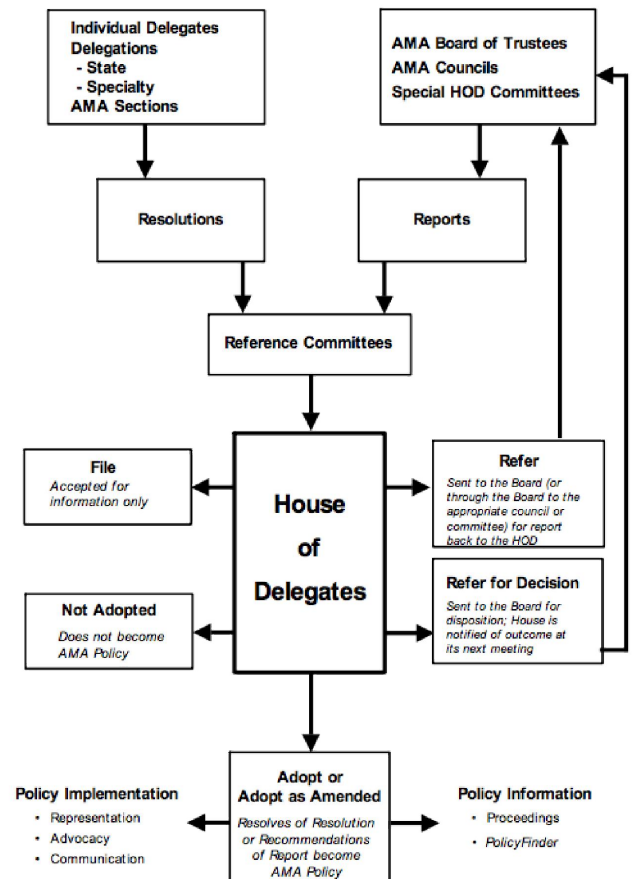
For more in-depth examples and guidance, please see the presentation that the Section Delegates gave on Giving Effective Testimony below:

- [Slides](#)
- [Recording](#)

## Appendix I: Structure of the AMA House of Delegates

The AMA House of Delegates is a complicated amalgam of various constituencies. The two largest constituencies are the State Delegations and the Specialty Delegations, which include representatives from specialty societies, such as the Medical Society of the State of New York, the American Academy of Pediatrics, and so on. There are also [12 sections](#), each represented by a single Delegate and Alternate in the HOD: the International Medical Graduate (IMG) Section, the Organized Medical Staff Section (OMSS), the Academic Physicians Section (APS), the Integrated Physician Practices Section (IPPS), the Private Practice Physicians Section (PPPS), the Senior Physicians Section (SPS), the Minority Affairs Section (MAS), the Women Physicians Section (WPS), the Young Physicians Section (YPS), the Resident and Fellow Section (RFS), the LGBTQ+ Section (LGBTQ+, new as of A-24!) and the Medical Student Section (MSS). Finally, there are a number of delegates representing other medical societies and the armed forces.

### How AMA Sets Policy



Resolutions are submitted to the AMA HOD by state delegations (all 50 states and some territories are represented), [member organizations](#) (Federal services, national medical specialty societies, national medical associations, and professional interest medical associations), and Sections of the AMA. Individual AMA Delegates may also submit resolutions to the AMA HOD, but this is less common. The full list of member organizations, Sections, and other delegations, including their member rosters, [can be found on the AMA website](#).

For the Annual Meeting, all resolutions received by the submission deadline are included as *official* Items of Business at the AMA HOD. For the Interim Meeting, resolutions are first reviewed by the Resolutions Committee (see [AMA Bylaws](#) 2.12.1.1 and 2.13.13) to determine if they are advocacy- or ethics-related, or urgent. Only such resolutions are accepted as Items of Business at the Interim AMA HOD.

### Reference Committees

HOD staff analyze each resolution accepted as a business item, and the Speakers assign it to one of several Reference Committees based on the topic it addresses.

At Annual, the Reference Committees include:

- CC&B: Constitution & Bylaws
- A: Medical Service
- B: Legislation
- C: Medical Education
- D: Public Health
- E: Science & Technology
- F: AMA governance and finance
- G: Medical Practice

At Interim, the Reference Committees include:

- CC&B: Constitution & Bylaws
- B: Legislation
- C: Advocacy related to Medical education
- F: AMA governance and finance
- J: Advocacy related to medical service, medical practice, insurance, and related topics
- K: Advocacy related to science and public health and related topics

Resolutions are made available to House membership in several batches. On-time resolutions are typically due about two months before the meeting and will appear in the first and largest batch, known as the **Handbook**.

Per the adoption of the recommendations from the Resolution Modernization Task Force at A-24, the **Online Reference Committees (ORC)** will replace the prior Virtual Reference Committee (VRC) and will open approximately 2 months prior to the meeting. They will remain **open for 3 weeks** after which the **Preliminary Reference Committee Reports** will be developed by the reference committees. All AMA members may comment on the ORC, and it is hoped a robust discussion will ensue. **Authors** are encouraged to comment as early as possible after the ORC opens.

Note that there is no limit on length of comments and that supplemental material may be added. However, please limit the addition of large files or photos. Please use a hyperlink where possible. Additionally, you are reminded that there will be **no reaffirmation calendar**. Discussion of potential policy that may be reaffirmed in lieu of a given resolution will occur on the ORC.

After the initial deadline, resolutions will still be accepted on time if and only if they are transmitted by a Section as an “Immediate Forward”. For example, the RFS Assembly concludes the Friday before the HOD Business Meeting. If the RFS Assembly votes to immediately transmit an item to the HOD, it will be accepted as on-time and included in the **Saturday/Sunday Tote**. Resolutions submitted after the “on-time” deadline for any other reason are considered **Late Resolutions** and will only be heard after review and recommendation of the Rules Committee and a two-thirds vote of the HOD. Resolutions submitted after the opening session has recessed are considered **Emergency Resolutions** and will only be heard after review and recommendation of the Rules Committee and a three-fourths vote of the HOD. For more information, [see the Bylaws](#).

RefComs are generally composed of 5-7 AMA HOD Delegates/ADs. At the hearings, these members hear testimony on the specific resolutions assigned to their RefCom.

*\*SDs and ADs are eligible to serve on RefComs—if you are interested, ask the RFS Delegates how to apply!*

After hearing the testimony, each RefCom meets in a closed session where they discuss each of their committee’s resolutions. They then formulate the RefCom Report, which will usually make one of the following four recommendations for each resolution (though often they will combine similar resolutions together and make one recommendation regarding all of them):

- 1) Recommended for Adoption
- 2) Recommended for Not Adoption
- 3) Recommended for Adoption with Substitution, Addition, or Deletion (the RefCom will provide specific language)
- 4) Recommended for Referral (to the Board of Trustees, which can then assign them to specific Councils)

These RefCom Reports are available to the AMA HOD as a Consent Calendar. The Speakers will give individual AMA Delegates a chance to “extract” items from the Consent Calendar. Any AMA Delegate can extract a resolution from the Consent Calendar; again, the Section Delegates fulfill the role of extracting the RFS’ desired extractions. After items have been extracted, the AMA HOD will vote to approve the remainder of the Consent Calendar. Then, they will debate and vote on each of the extracted items, which may be amended multiple times on the floor of the HOD before a final vote.

The conduct of the HOD is governed by the American Institute of Parliamentarians Standard Code of Parliamentary Procedure (ParliPro). If you want a fairly brief, high-level functional

overview of how business is conducted, you can review [this AMA MedHub interactive guide](#).

For a COMPLETE guide on the HOD, you can see the [House of Delegates Reference Manual](#), which is recreated every year. It is truly comprehensive (>100 pages) and will have answers to almost anything you are looking for.

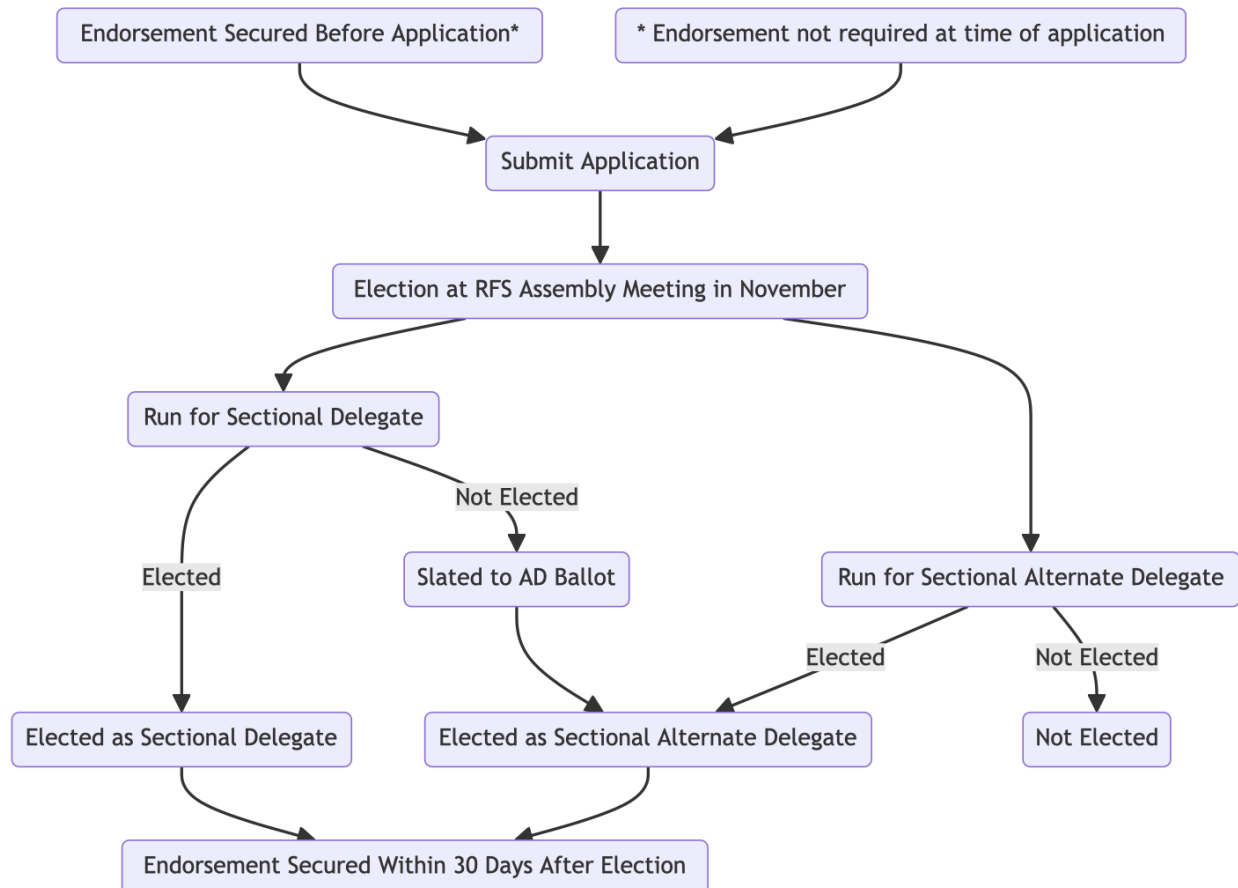
## Appendix II: Requesting Time Off to Attend the HOD

Most training programs want to support their trainees' professional development, and they typically understand that this includes not only classes but also being involved in professional activities such as the AMA. However, taking multiple days off to attend an HOD meeting can be difficult. The following tips may help:

1. **Contact your program director as soon as you are elected.** You should have a copy of your application. **\*NEW\*** Immediately following your election, the AMA will send a letter to your PD letting them know about your position, responsibilities, and expectations, including time off for meetings.
2. When you contact them, be as polite as possible. Let them know that you serve as a Delegate to the American Medical Association and give them the specific days you will have to miss to attend the AMA House of Delegates.
3. Explain the importance of the meeting if they are not familiar with the AMA. It often describes **how it will be useful to you personally in your career development** to learn and develop the skills associated with policy and advocacy and to network at this massive national meeting. You can also **describe to your PD the benefits to your program**—your program will get to say one of their residents is in national policy leadership! *(On that note, don't sell yourself short when talking to your PD—it is pretty awesome of you to be doing this and developing yourself as a leader while in training!)*
4. It will often help if you offer to make up missed time.
5. If you have questions or difficulties, please don't hesitate to contact your RFS Delegates. **If your program director is hesitant to give you time off, we can send them a letter from the AMA** explaining why you are needed at the HOD and how this position is beneficial to you individually and to your program.

## Appendix III: Securing an Endorsement

All RFS Sectional Delegates and Alternate Sectional Delegates (SDs/ADs) must be endorsed by either a state society or a specialty society in the HOD. A complete list of organizations represented in the AMA can be found [here](#). The Delegation rosters can be found [here](#), and the AMA Pictorial Directory can be found [here](#).



SDs/ADs may secure this endorsement either before or after the Interim meeting (though it is best to secure the endorsement before elections if possible). Endorsements must be secured, and notice of endorsement must be **sent to RFS staff (RFS@ama-assn.org) no later than 30 days after the SD/AD elections take place** (the RFS Assembly at the Interim meeting).

An endorsement indicates that the society supports that individual as a group representative. Every society handles this process differently, and some have their own timelines and deadlines and can only be endorsed a few times a year. Therefore, it is **critical to be proactive in obtaining your endorsement. Being elected in the RFS SD/AD election does not guarantee that a society will endorse you if you have not already secured an endorsement from them.**

Some societies will require candidates to go through interviews or similar processes before they endorse that candidate. All societies, to our knowledge, require the individual in question to be a member of the society to obtain an endorsement. When you are seeking an endorsement from a society, we recommend following these steps:

1. Ensure you are a member of the society.
2. If there were any SDs/ADs who were recently endorsed by the society, reach out to those members to ask about the endorsement process. Ask what the normal procedures are and see whether there are any leadership or staff you need to contact.
3. If you cannot find a previously endorsed member, try contacting any leadership you know within your society to ask whether they can direct you through the endorsement processes. You can also try contacting members of the society's delegation to the HOD, whose contact info can be found in the [AMA Pictorial Directory](#).
4. Please make sure any reach-outs are done in a professional and respectful manner—remember that you are asking an organization to allow you to represent them, and you yourself are representing and liaising for the RFS through your reach-out.
5. If a delegation has never endorsed an RFS member before, you can explain this benefits them by
  - a. Giving them additional representation in the House that they don't need more members to attain.
  - b. Giving them representation within the RFS Delegation, the member can now relay the society's input and priorities to the RFS.
  - c. Insight into the RFS' stances, as the member can relay these to the society.

Though it is not a requirement for an RFS endorsement, most endorsing societies do provide some level of financial support for the RFS members they endorse.

**If you have any difficulty securing an endorsement or if you are not certain which societies to contact about an endorsement, please contact the RFS Section Delegates as soon as possible. We are happy to help connect you with potential endorsing societies.**



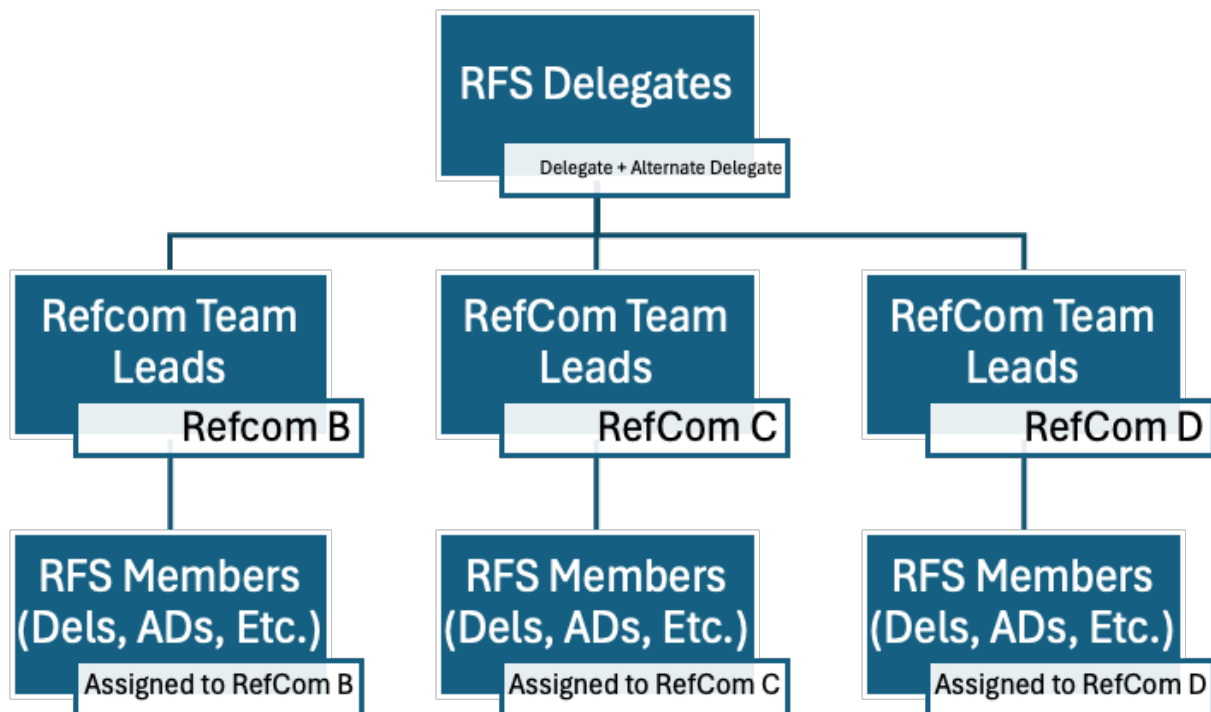
## Appendix IV: RefCom Team Leads

First of all, congratulations on being selected as a RefCom Team Lead. This is a big undertaking, and we have a lot of information to share about it, so **please read this entire section carefully.**

### Organization of RFS Caucus

The RFS Delegates are the Chairs of the RFS Caucus. They assign Team Leads (usually 2-3 people) to each RefCom (N=6 or 8 depending on the meeting) who are “in charge” of the business in that particular RefCom. Then, the remaining RFS members who are in the RefCom (mostly Sectional Delegates and Alternate Delegates, but also sometimes RFS Councilors and other trainees at the meeting) will review the items of business for that RefCom with their direct report being the Team Lead for that RefCom.

Below is a visual illustration showcasing this. Keep in mind that there are more RefComs than what are noted here.



### Team Lead Best Practices

As Team Leads, you help us lead the teams of RFS members working on the items of business in each RefCom. Your responsibilities include assigning work to team members, following up on completion, ensuring that the Brick is updated for your RefCom, leading the RFS Caucus discussion when we discuss your RefCom, and coordinating testimony on your RefCom throughout the meeting. Of course, you don't have to do this by yourself—you have a partner,

and your Section Delegates are always supporting you through each step! Below are some best practices which we have collated:

#### PRE-MEETING

1. Ensure you befriend your team co-lead, get their number, and prepare to be besties for the next few weeks.
2. Please make sure that you are updating your team frequently with changes to business, assignments, Resolutions Committee decisions (since this is Interim), etc.
3. If you have newer members on your team, follow up and ensure that everyone is familiar with action items from the meeting and the process for writing and approving testimony.
4. We will ask for your help in ensuring that everyone who was assigned to write testimony has done so and that all testimony is posted after approval.
5. As Team Leads, you will be responsible for posting all of your Team's testimony to the ORC. You can divide this work up to you, but your section Delegate is here to help!
6. It may be helpful to schedule a virtual call with your RefCom team to discuss reviews and priority items.
7. We'll communicate using GroupMe and email. We suggest that you communicate with your teams via email and/or GroupMe/WhatsApp/text as well. Please cc the RFS Delegates on every team email you send and add us to any RefCom group chats you have so we can stay in the loop.

#### At HOD

1. We will ask you to lead discussions for your RefComs at HOD Caucus meetings. Let us know if you cannot make the RFS Caucus meetings.
2. You will be running the show during your RefCom! This entails making sure your team is testifying when needed and that the responsibility of taking notes is distributed evenly throughout. Your Section Delegate will be available, but we'll be bouncing between RefComs based on when RFS priority items come up.
3. After RefComs end, we'll ask you to help us identify which items the caucus should highlight and/or re-discuss.
4. We'll engage you in assigning and writing testimony for HOD as well. Testifying in the House is exhilarating, and our goal is to give that opportunity to as many members as possible.
5. For your information, not everyone on your team may be at the meeting. For the SDs/ADs, replacements are currently being found, and they'll be added as we get them.
6. We tried to ensure everyone had enough support, so let us know if you will not. It may be helpful to have your own account of when people are arriving and leaving.