Society of Ortho-Bionomy International®

Policy Manual

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Section 1: Organizational, Board & International Policy

1.1 Board of Directors Policies

1.1.1 Members, Candidates

Associate and Above Level Members and Non-members with Professional Skills [2006.03.20]

1.1.2 Number

There shall be seven board members [1996.04.01]

1.1.3 Term

Term length is three years or until a successor is elected or qualified [1996.04.01]

1.1.4 Member Level

Three Board members must be Instructor level members [1996.04.01]

1.1.5 Oversee the Society

Oversee the Society of Ortho-Bionomy International (SOBI), subject to the limitations of the following documents:

1.1.5.1 **Articles of Incorporation:** SOBI is a mutual benefit corporation in the State of Indiana whose purpose is to promote and encourage the study and practice of Ortho-Bionomy.

1.1.5.2 Bylaws

1.1.5.3 **Indiana Non-profit Mutual Benefit Corporation Law** relating to actions by the members or by a majority of members, the activities and affairs of the corporation shall be conducted and all corporate powers shall be exercised by or under the direction of the Board of Directors.

[2011.01.01] [2022.04.18]

1.1.6 Compensation|Reimbursement

Compensation/Reimbursement for expenses determined by Board of Directors. [2011.01.01]

1.1.7 Officers

The officers are the President, Vice President, Secretary, and Treasurer. The Secretary and President cannot be the same person.

1.1.7.1 **President** is the Chief Executive Officer, General Manager and provides general supervision, direction, control of business and affairs of corporation, subject to the control of the Board

1.1.7.2 **Vice President** shall act as President in the absence or disability of the President.

1.1.7.3 **Secretary** shall keep a book of meeting minutes for members and the Board and a copy of the corporation's Articles and Bylaws, as amended to date

1.1.7.4 **Treasurer** is the Chief Financial Officer of the corporation; maintains adequate and correct accounts of the properties and business transactions of the corporation and receives and disburses all money, upon authorization by the Board

1.1.7.5 **Secretary and Treasurer** do not need to be members of the Board

[2011.01.01]

1.1.8 Annual Report

The Annual Report is created and members are notified within 120 days of fiscal year end (section 8321 of the California Corporations Code) [2011.01.01]

1.1.9 Bylaws - Bylaws may be amended by:

1.1.9.1 Majority vote of members present at a meeting of members, if meets quorum

1.1.9.2 Majority vote of authorized number of Board of Directors

[2011.01.01]

1.1.10 Bylaws Board Vote

1.1.10.1 May vote to change

1.1.10.2 May vote on change to Bylaws if majority of Board of Directors vote; Exception is changing the number of Directors [2011.01.01]

1.1.11 Number of Board of Directors Change

Can only be changed by a majority vote of members [2011.01.01]

1.1.12 Dissolution

Upon dissolution of this corporation, the assets remaining after payment of all known debts and liabilities shall be distributed to organizations which have established tax exempt status under Internal Revenue Code section 501(c)(3). [2011.01.01]

1.1.13 Indemnification

1.1.13.1 Corporation can indemnify person that was agent of corporation [2011.01.01]

1.1.14 Removal of a Board of Director (section 12)

1.1.14.1 The director has a continuing conflict of interest that cannot be reconciled or is failing in his/her fiduciary responsibilities.

1.1.14.2 The board member has crossed ethical borders, with potential lawsuits for sexual harassment, bullying or fraudulent activities.

1.1.14.3 The director is ineffective, not able to do the job, not participating appropriately in Board discussions or committee assignments.

1.1.14.4 The director is not interacting well with others.

1.1.14.5 The director acts independently of the Board in the name of the organization.

1.1.14.6 The director has unexcused absences from two Board meetings.

1.1.15 Instructor Agreement – Signed Agreement between Board of Directors and Instructors

(Note: This policy repeats in Section 3)

1.1.15.1 Instructors sign and agree to:

1.1.15.1.1 Abide by the Society of Ortho-Bionomy International (SOBI) Code of Ethics

1.1.15.1.2 Utilize the SOBI Trademarks and abide by the Ortho-Bionomy Trademark Guidelines

1.1.15.1.3 Be familiar with the SOBI training programs and handbooks

1.1.15.1.4 Review the Training Programs annually and familiarize myself with changes

1.1.15.1.5 Only advise trainees on training programs for the level I am qualified

1.1.15.1.6 Only teach courses for which I have been trained to teach

1.1.15.1.7 Send class lists to the SOBI office for the transcript database

1.1.15.1.8 Follow the SOBI Policies

1.1.15.1.9 Communicate with Board through the provided means if I have questions

1.1.15.1.10 Include Trademark Policy and SOBI information in my classes

1.1.15.1.11 Renew my membership annually

1.1.15.1.12 Complete and submit proof of Continuing Education every two years

1.1.15.1.13 Participate and abide by request in mediation or grievance process

1.1.15.2 Board signs and agrees to:

1.1.15.2.1 Abide by the Society of Ortho-Bionomy International Code of Ethics

1.1.15.2.2 Use the Principles, Mission and Vision as Guidelines for the Society to function

1.1.15.2.3 Conduct ourselves in a professional manner

1.1.15.2.4 Support and oversee Training Programs

1.1.15.2.5 Support and oversee Trademarks

1.1.15.2.6 Develop and provide transcripts for students/trainees

1.1.15.2.7 Directs notification to instructors of their and their trainee's evolvements

1.1.15.2.8 Directs notification to instructors of changes or updates to training programs and handbook

1.1.15.2.9 Maintain class list information and keep the material confidential

1.1.15.2.10 Provide materials to instructors to promote SOBI membership

1.1.15.2.11 Provide instructors with a means to contact the Board

1.1.15.2.12 Not sell or market class or member information

1.1.15.2.13 Provide web-space for marketing Ortho-Bionomy classes taught by registered instructors

1.1.15.2.14 Support instructors in their teaching, including offering study groups sponsored by SOBI

1.1.15.2.15 List instructors in the internal and public member directory

1.1.15.2.16 Continue to evolve SOBI technology and website to further support instructors

1.1.15.2.17 Listen and respond to the requests from instructors

1.1.15.2.18 Actively facilitate the resolution of complaints and grievances

[2016.05.16] [2025.11.06]

1.2 Organizational Policies

1.2.1 Code of Ethics – Members – Follow the Code of Ethics:

1.2.1.1 Uphold highest standard of professional behavior

1.2.1.2 Guided by principles of Ortho-Bionomy philosophy and concepts

1.2.1.3 Render highest quality of services for well-being and benefit of the client

1.2.1.4 Offer skills or services they have specifically been trained in

1.2.1.5 Protect privacy of their clients

1.2.1.6 Maintain regard for common legal, moral and ethical standards

1.2.1.7 Make clear distinction between Ortho-Bionomy and other modalities used

1.2.1.8 Bring notice to SOBI of ethically inappropriate or out-of-the-standards action another member takes

1.2.1.9 Use Society Trademarks in occurrence with Trademark Guidelines

1.2.1.10 Continue to complete Continuing Education training

1.2.1.11 Uphold professional relationships and not slander a member of the Ortho-Bionomy or allied professional community

1.2.1.12 People in their employment will abide by the Society Policies and Trademark

1.2.1.13 Display Code of Ethics in their work area

1.2.1.14 Understand transgression in Code of Ethics may result in surrender of their membership

[1985.10.02] [1987.10.01]

1.2.2 Meetings

1.2.2.1 Annual Meeting

Annual meeting of members are scheduled by Board of Directors [2011.01.01]

1.2.2.2 Special Meetings

Special meetings may be called by the Board of Directors, the President, or over 5% of the membership body [2011.01.01]

1.2.3 Membership

1.2.3.1 Membership Dues

Membership Dues are established by the Board of Directors

1.2.3.2 Membership Termination

1.2.3.2.1 Resignation by member

1.2.3.2.2 Failure to pay dues by due date

1.2.3.2.3 Expulsion by Board of Directors for prejudicial conduct to the interests of corporation after hearing has been conducted

[2011.01.01]

1.2.3.3 Emeritus Members

1.2.3.3.1 Any member who is over 65 years of age or has been an Active Member for at least 20 years can qualify to request Emeritus Membership status of Semi-Retired or Retired Membership. If a member becomes legally disabled, the age/20-year requirement may be waived.

1.2.3.3.2 Semi- Retired Member

1.2.3.3.2.1 Semi-Retired Members may choose to be Semi-Retired Practitioners, Semi-Retired Advanced Practitioners, Semi-Retired Instructors, or Semi-Retired Advanced Instructors.

1.2.3.3.2.2 Semi-Retired Members are still Active Members, who have limitations practicing or instructing.

1.2.3.3.2.3 Semi-Retired Members pay discounted membership dues.

1.2.3.3.2.4 Semi-Retired Members maintain the privileges attendant to the level of the desired Semi-Retired Membership status.

1.2.3.3.2.5 Semi-Retired Members must meet the requirements attendant to the level of the desired Semi-Retired Membership status.

1.2.3.3.3 Retired Member

1.2.3.3.3.1 Retired Members no longer earn income in any way from Ortho-Bionomy activities, including practicing, teaching, or advising.

1.2.3.3.3.2 Retired Members pay discounted membership dues.

1.2.3.3.3.3 Retired Members can use the Trademarks, receive the newsletter and SOBI member discounts, vote, and serve on committees or the Board.

1.2.3.3.3.4 There are no requirements to maintain membership beyond paying the dues.

[2023.08.14]

1.2.4 Voting

1.2.4.1 Board of Directors are elected by Associate Members – Advanced Instructors provide and maintain Training Program handbooks

1.2.4.2 Voting is completed by ballot [2011.08.28]

1.2.4.3 **Meeting notice** 10-90 days from meeting [2011.01.01]

1.2.4.4 **Quorum** – 5% of voting members is a quorum [2011.01.01] [2023.08.14]

1.2.4.5 Action without Meeting can be taken without a meeting if electronic or written ballot of every member is solicited by ballots setting forth the action to be

taken. Ballots total count, cast on or before the meeting, and at the meeting, must equal or exceed quorum of voting members to approve the action [2011.01.01]

1.2.4.6 Voting Format Protocol

1.2.4.6.1 **Voting members** – all members from the Associate member level through to the Advanced Instructor member level will/may elect Board of Directors, and may vote on changes in policies affecting the Board of Directors

1.2.4.6.2 **Registered Instructors** vote on Changes in curriculum, status of Instructors, changes in Instructor Training (except pertinent to all voting members)

1.2.4.6.3 **Board of Directors** vote on changes in policy or organizational function

[1984.06.25]

1.2.5 Grievance Policy

1.2.5.1 Grievance Policy, Grievance Procedure Handbook, and Grievance Forms to file are available on the website to members and non-members

1.2.5.2 Professional Conduct Committee (PCC)

1.2.5.2.1 All grievances go through the PCC

1.2.5.2.2 PCC consists of three members elected by voting members of SOBI

1.2.5.2.2.1 Results to be compiled confidentially by the SOBI office staff

1.2.5.2.2.2 PCC members remain confidential, known only by the SOBI office staff

1.2.5.2.3 Committee members must be Advanced Practitioner Members and above. At least one member must be an Instructor Member

1.2.5.2.4 PCC members will serve for one grievance or a three-year term, whichever comes first. No two terms can be consecutive.

1.2.5.2.5 Committee members must recuse themselves from a grievance if they have a conflict of interest and be replaced by a member of the Reserve Pool, as described in the PCC Handbook.

1.2.5.2.6 The PCC can reserve the right to expand their committee from the Reserve Pool to 5 members at their discretion for a specific grievance

1.2.5.2.7 Once the PCC has overseen one active grievance, a new PCC is chosen from the Reserve Pool, as described in the PCC Handbook.

1.2.5.2.8 If more than one grievance is active at the same time, additional PCC members are chosen from the Reserve Pool to form an additional PCC, so that each grievance has a separate committee specific to that grievance.

1.2.5.3 File a formal grievance

1.2.5.3.1 Grievance form confidentially goes directly to the PCC Chair via the office

1.2.5.3.2 Grievance can be filed by members or non-members

1.2.5.3.3 Grievances cannot be filed anonymously

1.2.5.4 PCC investigates

1.2.5.5 PCC reports to the Board

1.2.5.5.1 Board members must recuse themselves if they have a conflict of interest, if they are the complainant, or if they are the respondent

1.2.5.5.2 PCC compiles their report and makes a recommendation for the Board and submits it to the office

1.2.5.5.3 The PCC can redact information to protect the privacy of the parties

1.2.5.6 Board reviews the report and votes on the PCC recommendation

1.2.5.6.1 No action to be taken

1.2.5.6.2 Action to be taken (no hearing needed)

1.2.5.6.3 Hearing needed before an action can be taken

1.2.5.6.4 Any action which would result in expulsion from the Society requires a Special Board Hearing (also known as a Special Meeting)

1.2.5.7 An appeal may only be filed within 20 business days after the Board's decision

1.2.5.8 After one appeal, the Board's decision is final

1.2.5.9 Automatic grievances

1.2.5.9.1 The office files a grievance on behalf of the Society whenever an automatic grievance is triggered by Policy

1.2.5.10 PCC reports that lead to a permanent expulsion are to be kept indefinitely

1.2.5.10.1 All other PCC reports are to be expunged from the record after 7 years

1.2.5.11 The Statute of Limitation to file a Grievance is 1 year from the date of the incident

1.2.5.11.1 The Board reserves the right to extend the Statute of Limitation

[2023.03.02]

1.3 International Policy

1.3.1 Trainees

1.3.1.1 Upon entering any SOBI training program, a trainee must become a SOBI member

1.3.1.2 Practitioner and Advanced Practitioner trainees may take for credit a maximum of 64 total class hours taught by non-SOBI instructors who are in good standing with another Ortho-Bionomy organization

1.3.1.2.1 These hours may be applied in any combination to the trainee's Practitioner and/or Advanced Practitioner Training Programs

[2022.01.10] [2025.08.15]

1.3.1.3 Instructor trainees may Bench Assist and Co-Teach with non-SOBI instructors that are in good standing with another Ortho-Bionomy organization, with advisor approval [2025.08.15]

1.3.2 Instructors

1.3.2.1 Instructors teaching or training students in a SOBI training program:

1.3.2.1.1 If teaching in the United States, the instructor must be a SOBI instructor in good standing

1.3.2.1.2 If teaching outside the United States or online, the instructor must be a SOBI instructor in good standing or an instructor in good standing with another Ortho-Bionomy organization

[1999.04.15] [2022.02.07] [2025.08.15]

1.3.3 Members of Other Organizations

1.3.3.1 SOBI membership application requirements for members of other Ortho-Bionomy organizations:

1.3.3.1.1 Applicant must be in good standing with their current Ortho-Bionomy organization

1.3.3.1.2 Applicant must be vetted, based on the skills required for their member level, by a SOBI instructor member at their level or higher

1.3.3.1.3 SOBI office confirms the applicant is a member in good standing of their current Ortho-Bionomy organization

1.3.3.1.4 Board may ask the PRC or the IRC for their recommendation if needed

1.3.3.1.5 Application is reviewed by the Board; applicant is notified of Board's decision

1.3.3.1.6 If approved, applicant will become a member of SOBI at the same level as at their current organization

[2025.08.15]

1.3.4 International Membership Fee Discount

1.3.4.1 The International Membership Fee Discount is meant to offset the financial burden of belonging to two organizations at the same time

1.3.4.2 The fee discount applies to a SOBI member who lives outside the USA and is a member in good standing of another Ortho-Bionomy organization

1.3.4.3 The fee discount is set by the Board

[2025.08.15]

1.3.5 SOBI Instructors Teaching Outside the United States

1.3.5.1 SOBI Instructors are responsible for knowing and complying with all legal regulations in the country in which they are teaching, including Trademark laws, since SOBI trademarks are only registered in the United States. [2023.8.14]

1.3.5.2 SOBI Instructors must clearly state in their advertising/communications regarding the class the type of credit students will receive for the class (e.g. SOBI, NCBTMB, local organization, etc.). [2023.8.14]

1.3.5.3 When a SOBI Instructor teaches an online class, the physical location of the Instructor is the location of the class. [2023.8.14]

Section 2: Student, Associate, Practitioner, and Advanced Practitioner — Membership and Training Policy

2.1 Membership

2.1.1 Current Membership

2.1.1.1 Student members pay annual dues, but do not have Continuing Education requirements

2.1.1.2 Associate members, Practitioners, and Advanced Practitioners pay dues annually and complete one of the following Continuing Education options, every two years:

2.1.1.2.1 Sixteen units of Ortho-Bionomy classes

2.1.1.2.2 Attend the SOBI conference

[2011.04.26] [2025.10.22]

2.2 Types of Members

2.2.1 Student Members

2.2.1.1 Listed in internal member directory [2025.10.22]

2.2.2 Associate Members

2.2.2.1 Listed in internal and public member directory [2025.10.22]

2.2.2.2 Have publicly viewable online profile and web presence [2005.04.07]

2.2.2.3 May vote on Board of Director elections

2.2.3 Practitioner Members

2.2.3.1 Listed in internal and public member directory

2.2.3.2 Have publicly viewable online profile and web presence

2.2.3.3 May vote on Board of Director elections and General Policy

2.2.3.4 May do Lecture/Demonstrations

2.2.3.5 Can give sessions to trainees in the Practitioner Training Program and Advanced Practitioner Training Program

2.2.3.6 May not do Feedback Sessions, Evaluation Sessions, Consultations, or be an advisor

[2025.10.22]

2.2.4 Advanced Practitioner Members

2.2.4.1 Vote on Board of Directors Elections and General Policy

2.2.4.2 Listed in internal and public member directory

2.2.4.3 May do Lecture/Demonstrations

2.2.4.4 Can give sessions to trainees in the Practitioner Training Program and Advanced Practitioner Training Program

2.2.4.5 May not do Feedback Sessions, Evaluation Sessions, Consultations, or be an advisor

[2016.12.01] [2025.10.22]

2.3 Ortho-Bionomy Self-Care

2.3.1 Student Members

2.3.1.1 Any member who has attended a Phase 4, Ortho-Bionomy Self-Care, or Postural Re-Education & Post Techniques class may share Ortho-Bionomy Self-Care with friends and family

2.3.1.2 May not offer Ortho-Bionomy Self-Care as a paid service

2.3.2 Associate Members and Above

2.3.2.1 May share Ortho-Bionomy Self-Care with their clients as part of a session

2.3.2.2 May share Ortho-Bionomy Self-Care with a group

2.3.2.3 Must clearly state their SOBI member status

2.3.3 Student Members—Associate Instructors

2.3.3.1 May not represent themselves as an instructor of Ortho-Bionomy

2.3.3.2 May not represent Ortho-Bionomy Self-Care as a class for credit

[2025.07.10] [2025.10.22]

2.4 Training Programs

2.4.1 Class Requirements

2.4.1.1 All classes must be completed with qualified SOBI instructors or international instructors approved under the international policy [2025.10.22]

[see Section 3: What Level of Instructors and Experience Can Train Practitioners and Advanced Practitioners]

2.4.2 Evolvement Delay

2.4.2.1 Any evolvements can be delayed by the Board of Directors until outstanding grievances are resolved [2006.06.26]

2.4.3 Associate Training Segment of the Practitioner Training Program

2.4.3.1 Complete 114 units of Ortho-Bionomy instruction (all units count toward the Practitioner Training Program). Units consist of:

2.4.3.1.1 32 Phase Four

2.4.3.1.2 16 Phase Five

2.4.3.1.3 16 Phase Six

2.4.3.1.4 3, 8, 16 Units of Ethics see below for options:

2.4.3.1.4.1 3-hour Ethics of Practice consultation or study group with an Ortho-Bionomy instructor [2025.10.22]

2.4.3.1.4.2 Ethics and Emotions class – 8 or 16 unit Ortho-Bionomy Ethics class [2004.09.30]

2.4.3.1.5 Completed Electives to add up to 114 total units completed

2.4.3.2 1 Session Received – Receive a session from a registered Practitioner, Advanced Practitioner, or any level of instructor (counts in the PTP) [2004.09.30]

2.4.3.3 1 Feedback Session – Give a session for feedback to any level of instructor (counts in the PTP)

2.4.3.4 Request to become/evolve to Associate

2.4.3.4.1 Associate submission includes:

2.4.3.4.1.1 Associate evolvement request form

2.4.3.4.1.2 Appropriate pages of Practitioner Training Program Record showing completion of required 114 units of Associate training

2.4.3.4.2 Packet sent to SOBI office

2.4.3.4.3 Membership fee paid

2.4.3.4.4 SOBI office notifies applicant of receipt and evolvement status

2.4.3.5 Associate training is part of the Practitioner Training Program; therefore, the Associate units, including all classes and sessions, transfer directly to the Practitioner Training Program [2007.09.01]

[2025.10.22]

2.4.4 Practitioner Training Program (PTP)

Refer to the Practitioner Training Program handbook for full program details and descriptions. For clarity, this training section also includes some procedures.

2.4.4.1 Entrance into the PTP

2.4.4.1.1 Must be a SOBI member or join as a member at the same time as applying to the program

2.4.4.1.2 Apply to the program

2.4.4.1.3 Pay enrollment fee

[2011.06.16] [2025.10.22]

2.4.4.2 Practitioner Training Program Curriculum Units

2.4.4.2.1 64 Phase 4

2.4.4.2.2 16 Phase 5

2.4.4.2.3 16 Phase 6

2.4.4.2.4 16 Practitioner Training Seminar

2.4.4.2.5 16 Postural Re-education and Post Techniques

2.4.4.2.6 16 Isometrics and Isotonics

2.4.4.2.7 16 Exploration of Movement Patterns

2.4.4.2.8 16 Chapman's Neurolymphatic Reflexes

2.4.4.2.9 16 Ethics and Emotional Issues

2.4.4.2.10 16 Demonstration Skills

2.4.4.2.11 16 Elective(s)

2.4.4.2.12 18 Study Group (minimum of six 3-unit groups)

2.4.4.2.13 40 Residential (5 consecutive day minimum)

2.4.4.2.14 8 Sessions Received

2.4.4.2.15 3 Feedback Sessions

2.4.4.2.16 9 Consultations

2.4.4.2.17 3 Evaluation Sessions

2.4.4.2.18 1 Supervised Lecture/Demonstration

2.4.4.2.19 1 Essay

2.4.4.2.20 150 Documented Sessions

2.4.4.2.21 16 Elements of a Successful Practice (can be waived, see Waivers section)

2.4.4.2.22 32 Anatomy and Physiology (can be waived, see Waivers section)

[2006.06.26] [2025.10.22]

2.4.4.3 PTP Support Role Requirements

2.4.4.3.1 **Advisor**: Associate Instructor through Advanced Instructor

2.4.4.3.2 **Sessions Received:** from Practitioner through Advanced Instructor

2.4.4.3.3 **Feedback Sessions:** given to Associate Instructor through Advanced Instructor

2.4.4.3.4 **Consultations:** Associate Instructor through Advanced Instructor

2.4.4.3.5 **Evaluation Sessions:** given to Associate Instructor through Advanced Instructor

2.4.4.3.6 **Study Groups:** Associate Instructor through Advanced Instructor

2.4.4.3.7 **Supervised Demonstration**: Associate Instructor to Advanced Instructor

[2011.06.16] [2016.12.01] [2025.10.22]

2.4.4.4 Practitioner Advisor Guidelines and Responsibilities

2.4.4.4.1 Advisor is a SOBI registered Associate Instructor, Instructor, Associate Advanced Instructor, or Advanced Instructor

2.4.4.4.2 Responsible to review and confirm curriculum's requirements have been met

2.4.4.4.3 Receive a Feedback Session from trainee

2.4.4.4.4 Complete Consultations with trainee

2.4.4.4.5 Receive an Evaluation Session from trainee

2.4.4.4.6 Discuss and sign-off on waivers for trainee, if applicable

2.4.4.4.7 Review and confirm paperwork is in order for trainee

2.4.4.4.8 Recommends trainee to evolve to Practitioner

2.4.4.4.9 Will be the contact for the Practitioner Review Committee and the Board for the applicant, if there are questions on the paperwork

[2011.06.16] [2025.10.22]

2.4.4.5 Sessions Received

2.4.4.5.1 Eight sessions

2.4.4.5.2 Received from Practitioner(s) to Advanced Instructor(s)

[2025.10.22]

2.4.4.6 Feedback Sessions

2.4.4.6.1 Three sessions

2.4.4.6.2 Given to registered Associate Instructor(s) through Advanced Instructor(s)

Revision Date: 2016.12.01

2.4.4.6.3 One of the three sessions must be with the trainee's advisor

2.4.4.6.4 Feedback is recorded on the Practitioner Training Program Record

[2011.06.16] [2025.10.22]

2.4.4.7 Consultations

2.4.4.7.1 Nine consultations/private discussions

2.4.4.7.2 Conducted with Associate Instructor(s) through Advanced Instructor(s)

2.4.4.7.3 It is recommended that some be with the trainee's advisor

[2025.10.22]

2.4.4.8 Evaluation Sessions

2.4.4.8.1 Three sessions

2.4.4.8.2 Given to Associate Instructor(s) through Advanced Instructor(s)

2.4.4.8.3 One of the three sessions must be with the trainee's advisor

2.4.4.8.4 Evaluating advisor/instructor provides evaluation letter to trainee

[2025.10.22]

2.4.4.9 Study Groups

2.4.4.9.1 Six three-hour study groups

2.4.4.9.2 With advisor approval, two of the six study groups can be additional classes [2006.06.26]

[2025.10.22]

2.4.4.10 Supervised Lecture/Demonstration

2.4.4.10.1 Given as an introduction to Ortho-Bionomy

2.4.4.10.2 Minimum of 4 attendees

2.4.4.10.3 Reviewed and documented by a Supervising Instructor

2.4.4.10.4 Letter of documentation by Supervising Instructor provided to trainee

[2007.09.01] [2025.10.22] [2026.02.26]

2.4.4.11 Essay

2.4.4.11.1 Typed essay by trainee, at least one page in length

2.4.4.11.2 What the philosophy and principles of Ortho-Bionomy mean to the trainee personally and professionally

[2007.09.01] [2025.10.22]

2.4.4.12 Documented Sessions

2.4.4.12.1 150 documented sessions of entirely Ortho-Bionomy

2.4.4.12.2 Minimum of 20 different people

2.4.4.12.3 Each session a minimum of 30 minutes

2.4.4.12.4 Consult with advisor on how to document

[2007.09.01] [2025.10.22]

2.4.4.13 Waivers for Elements of a Successful Practice

2.4.4.13.1 Complete waiver request submissions sent to SOBI office, including:

2.4.4.13.1.1 Waiver form

2.4.4.13.1.2 Letter from advisor supporting the waiver

2.4.4.13.1.3 Letter from applicant requesting the waiver

2.4.4.13.1.4 Documentation of classes/training used for waiver, including at least one of the following options:

2.4.4.13.1.4.1 Proof of business management and public relations experience

2.4.4.13.1.4.2 Classes completed at college

2.4.4.13.1.4.3 Work-related training

2.4.4.13.2 Applicant must submit waiver request and receive approval prior to submitting final request for Practitioner evolvement

2.4.4.13.3 See Practitioner Handbook for procedure, details, etc.

[2006.06.26] [2025.10.22]

2.4.4.14 Waivers for Anatomy and Physiology

2.4.4.14.1 Advisor approval required

2.4.4.14.2 Complete waiver request submissions sent to SOBI office, including:

2.4.4.14.2.1 Waiver form

2.4.4.14.2.2 Letter from applicant requesting the waiver

2.4.4.14.2.3 Documentation of classes/training used for waiver, including at least one of the following options:

2.4.4.14.2.3.1 Classes completed at college

2.4.4.14.2.3.2 Training in massage school with equivalent hours

2.4.4.14.2.3.3 Professional training in the medical field

2.4.4.14.3 Applicant must submit waiver request and receive approval prior to submitting final request for Practitioner evolvement

2.4.4.14.4 See Practitioner Handbook for procedure, details, etc.

[2006.06.26] [2025.10.22]

2.4.4.15 Miscellaneous Electives

2.4.4.15.1 Animal clientele courses (e.g., equine and canine) can be used as 16 units of electives

2.4.4.15.2 Units from attending the full SOBI conference can be used as electives

[2018.02.09] [2025.10.22]

2.4.4.16 Request for evolvement to Practitioner

2.4.4.16.1 Practitioner evolvement submission includes:

2.4.4.16.1.1 Evolvement request form from applicant

2.4.4.16.1.2 Completed Practitioner Training Program Record form

2.4.4.16.1.3 Approved waiver form(s) (when applicable), signed by PRC Chair

2.4.4.16.1.4 One typed essay

2.4.4.16.1.5 Three typed evaluation letters

2.4.4.16.1.6 Typed Supervised Demonstration documentation letter from the Supervising Instructor

2.4.4.16.2 Submission materials emailed to SOBI office for next Practitioner Review Committee cycle

[see Practitioner Review Committee section for cycle dates]

2.4.4.16.3 Evolvement fee paid

2.4.4.16.4 Practitioner Review Committee sends recommendation to SOBI office for Board of Directors review

2.4.4.16.5 Recommendation reviewed by Board; applicant is notified of Board's decision

[2007.09.01] [2025.10.22]

2.4.5 Clarification of Classes in Practitioner and Advanced Practitioner Training

2.4.5.1 The same classes cannot be used in both the Practitioner Training Program and the Advanced Practitioner Training Program

2.4.5.1.1 Additional in-person classes taken beyond the requirements of the Practitioner Training Program can transfer to the Advanced Practitioner Training Program

[2007.09.01] [2025.10.22]

2.4.6 Advanced Practitioner Training Program (APTP)

Refer to the Advanced Practitioner Training Handbook for full program details and descriptions. For clarity, this training section also includes some procedures.

2.4.6.1 Entrance into the APTP

2.4.6.1.1 Must be a SOBI member in good standing

2.4.6.1.2 Completed at least 375 units in the Practitioner Training Program

2.4.6.1.3 Submit application to the APTP

2.4.6.1.4 Pay enrollment fee

[2011.06.16] [2025.10.22]

2.4.6.2 Advanced Practitioner Training Program Curriculum Units

2.4.6.2.1 16 Phase 4

2.4.6.2.2 16 Phase 5

2.4.6.2.3 16 Phase 6

2.4.6.2.4 8 Phase 7 [2006.03.10]

2.4.6.2.5 16 Postural Re-education and Post Techniques

2.4.6.2.6 16 Isometrics and Isotonics

2.4.6.2.7 16 Exploration of Movement Patterns

2.4.6.2.8 16 Chapman's Neurolymphatic Reflexes

2.4.6.2.9 16 Ethics and Emotional Issues

2.4.6.2.10 16 Cranial

2.4.6.2.11 120 Electives, Projects or Case Studies

2.4.6.2.12 18 Study Group (minimum of six 3-unit groups)

2.4.6.2.13 40 Residential (5 consecutive day minimum)

2.4.6.2.14 8 Sessions Received

2.4.6.2.15 3 Feedback Sessions

2.4.6.2.16 8 Consultations

2.4.6.2.17 3 Evaluation Sessions

2.4.6.2.18 1 Supervised Lecture/Demonstration

2.4.6.2.19 1 Essay

2.4.6.2.20 150 Documented Sessions

[2006.06.26] [2025.10.22]

2.4.6.3 APTP Support Role Requirements

2.4.6.3.1 **Advisor**: Registered Associate Instructor through Advanced Instructor

2.4.6.3.2 **Sessions Received**: from Practitioner(s) through Advanced Instructor(s)

2.4.6.3.3 **Feedback Sessions**: given to Associate Instructor(s) through Advanced Instructor(s)

2.4.6.3.4 **Consultations:** Associate Instructor(s) through Advanced Instructor(s)

2.4.6.3.5 **Evaluation Sessions:** given to Associate Instructor(s) through Advanced Instructor(s)

2.4.6.3.6 **Study Groups:** Associate Instructor(s) through Advanced Instructor(s)

[2016.12.01] [2025.10.22]

2.4.6.4 Advanced Practitioner Advisor Guidelines and Responsibilities

2.4.6.4.1 Advisor is a SOBI registered Associate Instructor through Advanced Instructor

2.4.6.4.2 Responsible to review and confirm curriculum and program requirements have been met

2.4.6.4.3 Receive a Feedback Session from trainee

2.4.6.4.4 Receive an Evaluation Session from trainee

2.4.6.4.5 Complete Consultations with trainee

2.4.6.4.6 Review and confirm training program documentation is in order for Trainee

2.4.6.4.7 Mentor and support trainee through the Advanced Practitioner Training Program

2.4.6.4.8 Recommends trainee to evolve to Advanced Practitioner

2.4.6.4.9 Discusses elective options – i.e. Class Elective, Community Project, Research/Case Study

2.4.6.4.10 Will be the contact for Practitioner Review Committee or Board for the applicant if there are questions on the training program documentation

[2011.06.16] [2025.10.22]

2.4.6.5 Electives Options

2.4.6.5.1 Complete one or a combination of the following, totaling 120 units:

2.4.6.5.1.1 Additional Ortho-Bionomy classes –or–

2.4.6.5.1.2 Case Studies –or–

2.4.6.5.1.3 Research/Community Service Project

[2011.06.16] [2025.10.22]

2.4.6.5.2 Case Studies Electives Option

2.4.6.5.2.1 One to five case studies

2.4.6.5.2.2 At least 4 sessions per client/case study

2.4.6.5.2.3 Documented change in client over time

2.4.6.5.2.4 Documentation includes:

2.4.6.5.2.4.1 Subjective complaints

2.4.6.5.2.4.2 Medical history

2.4.6.5.2.4.3 Objective findings

2.4.6.5.2.4.4 Assessment of subjective and objective findings

2.4.6.5.2.4.5 Description of sessions

2.4.6.5.2.4.6 Techniques used

2.4.6.5.2.4.7 Response of client

2.4.6.5.2.4.8 Trainee's conclusions

2.4.6.5.2.5 Advisor guides documentation format to create consistent reporting from all trainees

[2006.03.10] [2025.10.22]

2.4.6.5.3 Projects Elective Option

2.4.6.5.3.1 Research/community project

2.4.6.5.3.2 Designed by the trainee and advisor

2.4.6.5.3.3 Typed report included in final program documentation submission

2.4.6.5.3.4 Could be an academic research project

2.4.6.5.3.5 Could be community service with a specific group

2.4.6.5.3.6 Advisor guides documentation format to create consistent reporting from all trainees

2.4.6.5.3.7 See the Advanced Practitioner Training handbook for ideas and details

[2006.03.10] [2025.10.22]

2.4.6.6 Sessions Received

2.4.6.6.1 Eight sessions

2.4.6.6.2 Received from Practitioner(s) to Advanced Instructor(s)

[2025.10.22]

2.4.6.7 Feedback Sessions

2.4.6.7.1 Three sessions

2.4.6.7.2 Given to Registered Associate Instructor(s) through Advanced Instructor(s)

2.4.6.7.3 One of the three sessions must be with the trainee's advisor

2.4.6.7.4 Feedback is recorded on the Advanced Practitioner Training Program Record form

[2011.06.16] [2025.10.22]

2.4.6.8 Consultations

2.4.6.8.1 Eight consultations/private discussions

2.4.6.8.2 Conducted with Associate Instructor(s) to Advanced Instructor(s)

2.4.6.8.3 It is recommended that some be with the trainee's advisor

[2007.09.01] [2025.10.22]

2.4.6.9 Evaluation Sessions

2.4.6.9.1 Three sessions

2.4.6.9.2 Given to Associate Instructor(s) through Advanced Instructor(s)

2.4.6.9.3 One of the three sessions must be with the trainee's advisor

2.4.6.9.4 Evaluating advisor/instructor(s) provide typed evaluation to trainee

[2011.06.16] [2025.10.22]

2.4.6.10 Study Groups

2.4.6.10.1 Six three-hour study groups

2.4.6.10.2 Two of the six study groups can be additional classes with advisor approval

[2007.09.01] [2025.10.22]

2.4.6.11 Supervised Lecture/Demonstration

2.4.6.11.1 Given as an introduction to Ortho-Bionomy

2.4.6.11.2 Minimum of 4 attendees

2.4.6.11.3 Observed and documented by a Supervising Instructor, either in person, live online, or recorded video

2.4.6.11.4 Letter of documentation by Supervising Instructor provided to trainee

[2006.03.10] [2025.10.22]

2.4.6.12 Essay

2.4.6.12.1 Typed essay by trainee, at least one page in length

2.4.6.12.2 What the philosophy and principles of Ortho-Bionomy mean to the trainee personally and professionally

[2007.09.01] [2025.10.22]

2.4.6.13 Documented Sessions

2.4.6.13.1 150 documented sessions of entirely Ortho-Bionomy

2.4.6.13.2 Minimum of 20 different people

2.4.6.13.3 Each session a minimum of 30 minutes

2.4.6.13.4 Consult with advisor on how to document

[2007.09.01] [2025.10.22]

2.4.6.14 Miscellaneous Electives

2.4.6.14.1 Animal clientele courses (e.g., equine and canine) can be used as 32 units of electives

2.4.6.14.2 Units from attending the full SOBI conference can be used as electives

[2018.02.09] [2025.10.22]

2.4.6.15 Request for Evolvement to Advanced Practitioner

2.4.6.15.1 Advanced Practitioner Training Program evolvement submission includes:

2.4.6.15.1.1 Evolvement request form

2.4.6.15.1.2 Completed Advanced Practitioner Training Program Record form

2.4.6.15.1.3 One typed essay

2.4.6.15.1.4 Three typed evaluation letters

2.4.6.15.1.5 Typed Supervised Demonstration documentation letter from the Supervising Instructor

2.4.6.15.2 Submission materials emailed to SOBI office for next Practitioner Review Committee cycle
[see PRC section for cycle dates]

2.4.6.15.3 Evolvement fee paid

2.4.6.15.4 Practitioner Review Committee sends their recommendation to SOBI office for Board of Directors review

2.4.6.15.5 Recommendation reviewed by Board; applicant is notified of Board's decision

[2011.06.16] [2025.10.22]

Section 3: Instructor Membership and Training Policy

3.1 Membership

3.1.1 Current Membership

3.1.1.1 Associate Instructor, Instructor, Associate Advanced Instructor, and Advanced Instructor Continuing Education and current membership consists of:

3.1.1.1.1 One of the following, every two years: [2024.03.18]

3.1.1.1.1.1 Sixteen Continuing Education Units of Ortho-Bionomy classes –or– [2024.03.18]

3.1.1.1.1.2 Teach a class with a registered instructor and be responsible for half of the material –or– [2024.03.18]

3.1.1.1.1.3 Be observed teaching by a registered instructor –or– [2024.03.18]

3.1.1.1.1.4 Attend the Ortho-Bionomy Conference and Instructor Retreat

3.1.1.1.2 Annual payment of membership dues to maintain current status as an instructor at approved member level

3.1.2 Reduced Membership Option for Instructors

3.1.2.1 An instructor who is not teaching may move to a reduced level of SOBI membership, such as Advanced Practitioner

3.1.2.2 Any SOBI materials will reflect the updated level of membership

3.1.2.3 Would only have the privileges and responsibilities attendant to that level

3.1.3 Resuming Instructor Membership

3.1.3.1 A former instructor who has reduced their membership or left the Society can choose to resume instructor membership status through the following:

3.1.3.1.1 In addition to payment of the appropriate rate of dues,

3.1.3.1.2 The instructor must teach half a class or be observed teaching an entire class by another registered instructor [2005.12.17]

3.1.3.1.2.1 The registered instructor who taught with them or observed the class must submit email notice to the SOBI office that the requirement was fulfilled

[2025.09.02] [2025.11.20]

3.2 Training Level Requirements

3.2.1 What Level of Instructors Can Train Practitioners and Advanced Practitioners

3.2.1.1 Associate Instructor – Advanced Instructor:

3.2.1.1.1 Advisor

3.2.1.1.2 Session Received

3.2.1.1.3 Feedback Session

3.2.1.1.4 Evaluation Session

3.2.1.1.5 Study Group

3.2.1.1.6 Consultation

3.2.1.1.7 Supervised Demonstration [2024.03.18]

3.2.2 What Level of Instructors and Experience Can Train Instructors

3.2.2.1 **Bench:** Instructor—Advanced Instructor with at least 1 year of active teaching experience [2011.07.19]

3.2.2.1.1 A trainee may do observation-only Bench Assists with a new Instructor who has not yet met the 1-year requirement, with advisor approval [2025.09.02]

3.2.2.2 **Co-Teach**: Instructor—Advanced Instructor with at least 2 years of active teaching experience [2011.07.19]

3.2.2.3 **Supervised Teach:** Instructor—Advanced Instructor with at least 2 years of active teaching experience

3.2.2.4 **Advisor:** Instructor—Advanced Instructor with at least 2 years of active teaching experience [2011.07.19]

3.2.3 What Level of Instructors and Experience Can Train Associate Advanced Instructors

3.2.3.1 **Bench:** Associate Advanced Instructor—Advanced Instructor with at least 1 year of active teaching experience at the Associate Advanced Instructor level or above

3.2.3.1.1 A trainee may do observation-only Bench Assists with a new Associate Advanced Instructor who has not yet met the 1-year requirement, with advisor approval

3.2.3.2 **Co-Teach**: Associate Advanced Instructor—Advanced Instructor with at least 2 years of active teaching experience at the Associate Advanced Instructor level or above

3.2.3.3 **Supervised Teach:** Associate Advanced Instructor—Advanced Instructor with at least 2 years of active teaching experience at the Associate Advanced Instructor level or above

3.2.3.4 **Advisor:** Associate Advanced Instructor—Advanced Instructor with at least 2 years of active teaching experience at the Associate Advanced Instructor level or above

[2025.09.02]

3.2.4 What Level of Instructors and Experience Can Train Advanced Instructors

3.2.4.1 **Bench:** Advanced Instructor with at least 1 year of active teaching experience at the Advanced Instructor level

3.2.4.1.1 A trainee may do observation-only Bench Assists with a new Advanced Instructor who has not yet met the 1-year requirement, with advisor approval

3.2.4.2 **Co-Teach**: Advanced Instructor with at least 2 years of active teaching experience at the Advanced Instructor level

3.2.4.3 **Supervised Teach:** Advanced Instructor with at least 2 years of active teaching experience at the Advanced Instructor level

3.2.4.4 **Advisor:** Advanced Instructor with at least 2 years of active teaching experience at the Advanced Instructor level

[2025.09.02]

3.3 Instructor Agreement - Board of Directors & Instructors

Note: this section is a repeat of section 1.1.15, including 1.1.15.1 and 1.1.15.2 and their subpoints

3.3.1 Instructors sign and agree to:

3.3.1.1 Abide by the Society of Ortho-Bionomy International (SOBI) Code of Ethics [1985.02.10]

3.3.1.2 Utilize the SOBI Trademarks and abide by the Ortho-Bionomy Trademark Guidelines

3.3.1.3 Be familiar with the SOBI training programs and handbooks

3.3.1.4 Review the Training Programs annually and familiarize myself with changes

3.3.1.5 Only advise trainees on training programs for the level I am qualified

3.3.1.6 Only teach courses for which I have been trained to teach

3.3.1.7 Send class lists to the SOBI office for the transcript database

3.3.1.8 Follow the SOBI Policies

3.3.1.9 Communicate with the Board through the provided means if I have questions

3.3.1.10 Include Trademark Policy and SOBI information in my classes

3.3.1.11 Renew my membership annually

3.3.1.12 Complete and submit proof of Continuing Education every two years

3.3.1.13 Participate and abide by request in mediation or grievance process

3.3.2 Board signs and agrees to:

3.3.2.1 Abide by the Society of Ortho-Bionomy International Code of Ethics

3.3.2.2 Use the Principles, Mission and Vision as Guidelines for the Society to function

3.3.2.3 Conduct ourselves in a professional manner

3.3.2.4 Support and oversee Training Programs

3.3.2.5 Support and oversee Trademarks

3.3.2.6 Develop and provide transcripts for students/trainees

3.3.2.7 Directs notification to instructors of their and their trainees' evolvements

3.3.2.8 Directs notification to instructors of changes or updates to training programs and handbooks

3.3.2.9 Maintain class list information and keep the material confidential

3.3.2.10 Provide materials to instructors to promote SOBI membership

3.3.2.11 Provide instructors with a means to contact the Board

3.3.2.12 Not sell or market class or member information

3.3.2.13 Provide web space for marketing Ortho-Bionomy classes taught by registered instructors

3.3.2.14 Support instructors in their teaching, including offering study groups sponsored by SOBI

3.3.2.15 List instructors in the internal and public member directory

3.3.2.16 Continue to evolve SOBI technology and website to further support instructors

3.3.2.17 Listen and respond to requests from instructors

3.3.2.18 Actively facilitate the resolution of complaints and grievances [2016.05.16]

3.4 Who Can Teach Each Class

3.4.1 Registered Associate Instructors

3.4.1.1 Study Groups

3.4.1.1.1 Associate Instructors may only include material from classes that they have bench assisted, with approval from their advisor, or co-taught [2025.09.02]

3.4.1.1.2 Material may also include Ortho-Bionomy Self-Care [2025.09.02]

3.4.1.2 Ethics of Practice study groups [2025.09.02]

3.4.1.2.1 Include discussion of SOBI Code of Ethics and Trademark Policies

3.4.1.2.2 Include self-reflection by the students [2025.09.02]

3.4.2 Registered Instructors

3.4.2.1 All items listed for Associate Instructors, plus the following:

3.4.2.1.1 Study Groups

3.4.2.1.1.1 Instructors and above may include material based on the classes that they have been approved to teach, and are expected to maintain integrity at their instructor level [2025.09.02]

3.4.2.1.1.2 Instructors and above may also include material from classes at their level, that they have been training to teach [2025.09.02]

3.4.2.1.1.3 Study groups may be comprised of new information that the instructor is exploring in their practice

3.4.2.1.2 Standard Phase 4 Classes [2025.09.02]
[see Section 6 Definitions]

3.4.2.1.3 The following classes may be taught after co-teaching and being approved by the Supervising Instructor, unless already completed and approved during the Instructor Training Program. The Supervising Instructor may require a Bench Assist before the Co-Teach. The SOBI office must receive a letter of approval to teach from the Supervising Instructor.

3.4.2.1.3.1 Postural Re-Education & Post-Techniques

3.4.2.1.3.2 Isometrics & Isotonics

3.4.2.1.3.3 Exploration of Movement Patterns

3.4.2.1.3.4 Practitioner Training Seminar

[2025.09.02]

3.4.2.1.4 The following classes may be taught based on the instructor's own assessment of their readiness to teach the class:

3.4.2.1.4.1 In-Depth and Non-Standard Phase 4 Classes [2025.09.02]

3.4.2.1.4.2 Anatomy & Physiology

3.4.2.1.4.3 Demonstration Skills

3.4.2.1.4.4 Elements of a Successful Practice

3.4.2.1.4.5 Ortho-Bionomy Self-Care [2025.09.02]

[2006.06.26]

3.4.2.1.5 Electives

3.4.2.1.5.1 **For a new elective**: fulfill submission and approval requirements

3.4.2.1.5.2 **For a previously approved elective**: an instructor must Co-Teach and be approved by the Supervising Instructor

[2025.09.02]

3.4.2.1.6 Residential – see Residential section for specific requirements

3.4.2.1.7 Instructor Training Seminar (ITS) – see ITS section for specific requirements

3.4.3 Registered Associate Advanced Instructors

3.4.3.1 All items listed for Associate Instructors and Instructors that one is qualified to teach, plus the following:

3.4.3.2 Phase 5

3.4.3.3 The following classes may be taught after co-teaching and being approved by the Supervising Instructor, unless already completed and approved during the Advanced Instructor Training Program. The Supervising Instructor may require a Bench Assist before the Co-Teach. The SOBI office must receive a letter of approval to teach from the Supervising Instructor:

3.4.3.3.1 Chapman's Neuro-Lymphatic Reflexes

3.4.3.3.2 Visceral

[2025.09.02]

3.4.3.4 Advanced Instructor Training Seminar (AITS) – see AITS section for specific requirements

3.4.4 Registered Advanced Instructors

3.4.4.1 All items listed for Associate Instructors, Instructors, and Associate Advanced Instructors that one is qualified to teach, plus the following:

3.4.4.2 Phase 6

3.4.4.3 The following classes may be taught after co-teaching and being approved by the Supervising Instructor, unless already completed and approved during the Advanced Instructor Training Program. The Supervising Instructor may require a Bench Assist before the Co-Teach. The SOBI office must receive a letter of approval to teach from the Supervising Instructor:

3.4.4.3.1 Ethics & Emotional Issues

3.4.4.3.2 Phase 7

3.4.4.3.3 Cranial

[2025.09.02]

3.4.5 Electives

3.4.5.1 Elective Development:

3.4.5.1.1 Electives that count for SOBI training programs will be approved by the Curriculum Review Committee

3.4.5.1.2 May include material based on the classes the instructor has been approved to teach [2025.09.02]

3.4.5.1.3 May also include new information that the instructor is exploring in their practice [2025.09.02]

3.4.5.1.4 Instructors are expected to maintain integrity at their instructor level [2025.09.02]

3.4.5.1.5 Instructor submission includes:

3.4.5.1.5.1 Completed elective submission form

3.4.5.1.5.2 Course material

3.4.5.1.5.3 Course description used for promotions/advertising

3.4.5.1.5.4 Documentation of permission to teach material (if applicable) [2025.09.02]

3.4.5.2 Elective Review – Elective courses can be reviewed:

3.4.5.2.1 SOBI Board may determine the means for a current elective to be reviewed

3.4.5.2.2 Course participant may request a review to the SOBI Board

3.4.5.2.3 SOBI Board may request CRC to review the elective [2006.07.25] [2006.06.26]

3.4.6 Residential

3.4.6.1 Must be at least 40 units, 5 consecutive day minimum

3.4.6.2 Who can teach a Residential:

3.4.6.2.1 Every Residential must be taught by at least one Advanced Instructor who has previously benched, co-taught, and been approved to teach a Residential

3.4.6.2.2 Collaborative/Team Teach: Instructor-Advanced Instructor

3.4.6.2.2.1 An instructor may teach material beyond the classes they have been approved to teach when supervised by an Advanced Instructor

3.4.6.3 Training process and requirements to teach a Residential:

3.4.6.3.1 Bench: Associate Advanced Instructor, Advanced Instructor, or Instructor enrolled in the Advanced Instructor Training Program

3.4.6.3.2 Co-Teach: Associate Advanced Instructor or Advanced Instructor

3.4.6.3.2.1 Two individuals/trainees may not Co-Teach the same Residential

3.4.6.3.3 Approval to teach

3.4.6.3.3.1 The SOBI office must receive a letter of approval to teach via email or mail from the Supervising Instructor [2025.09.02]

3.4.7 Instructor Training Seminar (ITS)

3.4.7.1 ITS Part I and Part II are 40 hours each [2025.09.02]

3.4.7.2 ITS structure and length are consistent so that Part I and Part II can be with the same or a different set of trainers and still cover all required topics [2005.09.08]

3.4.7.3 ITS should include elements of Phase V and Phase VI [2005.09.08]

3.4.7.4 Who can teach an ITS:

3.4.7.4.1 Every ITS must include at minimum both the following:

3.4.7.4.1.1 One Advanced Instructor who has benched, co-taught, and has been approved to teach ITS [2006.03.12] [2025.09.02]

3.4.7.4.1.2 One Instructor to Advanced Instructor who at minimum has had their application to train ITS approved; ideally they have benched and been approved to Co-Teach [2006.03.12] [2025.09.02]

3.4.7.4.1.2.1 Instructors must be enrolled in the Advanced Instructor Training Program [2025.09.02]

3.4.7.4.2 At least two Advanced Instructors who have been approved to teach ITS is ideal [2025.09.02]

3.4.7.5 Training process and requirements to teach ITS:

3.4.7.5.1 Approved application to train [2025.09.02]

3.4.7.5.1.1 Application includes two recommendations from Advanced Instructors, preferably one of whom is approved to teach ITS [2025.09.02]

3.4.7.5.1.2 Applicant must be an Associate Advanced Instructor, Advanced Instructor, or Instructor enrolled in the Advanced Instructor Training Program [2025.09.02]

3.4.7.5.1.3 Applications are reviewed for approval by the IRC [2025.09.02]

3.4.7.5.2 Bench

3.4.7.5.3 Co-Teach

3.4.7.5.4 Approval to teach

3.4.7.5.4.1 The SOBI office must receive a letter of approval to teach via email or mail from the Supervising Instructor [2025.09.02]

3.4.7.6 Maximum training combinations in an ITS:

3.4.7.6.1 Three individuals/trainees bench assisting -*or*-

3.4.7.6.2 One individual/trainee co-teaching and two trainees bench assisting -*or*-

3.4.7.6.3 Two individual/trainees co-teaching and one trainee observation-only bench assisting

3.4.7.6.3.1 When two individuals/trainees are co-teaching during the same ITS, each is responsible for presenting at least 1/3 of the class material

3.4.7.6.3.2 This is an exception to the Co-Teach definition requirement [2025.09.02]

3.4.8 Advanced Instructor Training Seminar (AITS)

3.4.8.1 Who can teach an AITS:

3.4.8.1.1 Every AITS must include at minimum both the following:

3.4.8.1.1.1 One Advanced Instructor who has benched, co-taught, and has been approved to teach AITS

3.4.8.1.1.2 One Associate Advanced Instructor or Advanced Instructor who at minimum has had their application to train AITS approved; ideally they have benched and been approved to Co-Teach

3.4.8.1.2 At least two Advanced Instructors who have been approved to teach AITS is ideal

3.4.8.2 Training process and requirements to teach AITS:

3.4.8.2.1 Approved application to train

3.4.8.2.1.1 Application includes two recommendations from Advanced Instructors, preferably one of whom is approved to teach AITS

3.4.8.2.1.2 Applicant must be an Associate Advanced Instructor or Advanced Instructor

3.4.8.2.1.3 Applications are reviewed for approval by the IRC

3.4.8.2.2 Bench

3.4.8.2.3 Co-Teach

3.4.8.2.4 Approval to teach

3.4.8.2.4.1 The SOBI office must receive a letter of approval to teach via email or mail from the Supervising Instructor

3.4.8.3 Maximum training combinations in an AITS:

3.4.8.3.1 Three individuals/trainees bench assisting -*or*-

3.4.8.3.2 One individual/trainee co-teaching and two trainees bench assisting -*or*-

3.4.8.3.3 Two individuals/trainees co-teaching and one trainee observation-only bench assisting

3.4.8.3.3.1 When two trainees are co-teaching during the same AITS, each is responsible for presenting at least 1/3 of the class material

3.4.8.3.3.2 This is an exception to the Co-Teach definition requirement [2025.09.02]

3.4.9 Internal Work

No credit or endorsement will be given by the Society for any Ortho-Bionomy class, required or elective, in which internal work is done, with the exception of intraoral work. Instructors teaching intraoral work must observe and inform students of their responsibility to follow the appropriate laws, decisions, and regulations of the federal, state, and local government, and adhere to state or local jurisdiction's scope of practice guidelines. Intraoral work may only be taught by instructors who have been approved to teach it either by other education/licensure or the SOBI class approval process. (This was written with the advice of our attorney.) [1992.04.24] [2025.07.18]

3.5 Instructor Training Program

See the Instructor Training Program Handbook for Program Details. For clarity, some procedure is included with Policy.

3.5.1 Advisor Guidelines and Responsibilities

3.5.1.1 Advisor is an Instructor—Advanced Instructor with at least 2 years of active teaching experience

3.5.1.2 Responsible to review and understand the most current Instructor Training Program policies and handbook [2025.09.02]

3.5.1.3 Recommends applicant when applying to the Instructor Training Program

3.5.1.4 Responsible to review trainee's submissions, including applications, and confirm curriculum requirements have been met at each level of training

3.5.1.5 Will review and confirm training program documentation is complete and in order for the trainee at each level

3.5.1.6 Mentors and supports the trainee through their program, benching and co-teaching when possible

3.5.1.7 Confirms trainee works with at least two instructors throughout their Bench Assists and Co-Teaches

3.5.1.8 Recommends applicant to evolve to Associate Instructor

3.5.1.9 Confirms Supervised Teach is clearly identified as a Supervised Teach

3.5.1.10 Works with trainee to get in-person Supervised Teach [2024.03.18]

3.5.1.10.1 If in-person Supervised Teach is not possible, will work with IRC and trainee to confirm if online Supervised Teach will be allowed [2024.03.18]

3.5.1.11 Recommends applicant to evolve to Instructor

3.5.1.12 Will be the contact for the Instructor Review Committee or the Board, for applicant if there are questions.

3.5.2 Applying to the Instructor Training Program

3.5.2.1 Applicant requirements:

3.5.2.1.1 Current member of SOBI in good standing

3.5.2.1.2 Registered Advanced Practitioner of Ortho-Bionomy -or-

3.5.2.1.3 Practitioner enrolled in and completed at least 375 hours of the Advanced Practitioner Training Program [2011.07.19]

3.5.2.1.4 Remains a member of SOBI in good standing throughout their training [2020.04.09]

3.5.2.2 Application submission includes:

3.5.2.2.1 Typed answers to essay questions

3.5.2.2.2 Advisor recommendation form

3.5.2.2.3 Instructor recommendation form

3.5.2.2.4 Advisor selection form

3.5.2.2.5 Indication that applicant is either a:

3.5.2.2.5.1 Registered Advanced Practitioner -or-

3.5.2.2.5.2 Practitioner with at least 375 units of Advanced Practitioner training completed. Practitioners must also include:

3.5.2.2.5.2.1 Copy of Advanced Practitioner Training Program record form

3.5.2.2.5.2.2 Letter from Advanced Practitioner advisor confirming 375 units completed

3.5.2.3 Submission materials emailed to SOBI office for next Instructor Review Committee cycle

[see IRC section for submission dates]

3.5.2.4 Application fee paid

3.5.2.5 IRC sends recommendations to SOBI office for Board of Directors review

3.5.2.6 Recommendations reviewed by Board; applicant is notified of Board's decision

3.5.2.7 Once approved, applicant may attend ITS [2011.07.19]

3.5.3 Instructor Training Seminar (ITS) is Required for ITP Trainees

3.5.3.1 ITP applicant must submit application and be approved by the IRC and SOBI Board prior to attending ITS

3.5.3.2 A trainee cannot attend ITS until the class instructors have seen the trainee's email of acceptance into the ITP from the SOBI office [2019.01.31]

3.5.3.3 ITS Part I is a prerequisite for ITS Part II

3.5.3.4 A trainee can only attend ITS Part II at least 6 months after attending ITS Part I

3.5.4 Bench Assist Guidelines

3.5.4.1 All Bench Assists must be completed with qualified SOBI instructors or international instructors approved under the international policy [2025.09.02]
[see What Level of Instructors and Experience Can Train Instructors]

3.5.4.2 Practitioners: must have completed at least 375 units of the Advanced Practitioner Training Program; may only Bench Assist one class for credit prior to completing ITS Part I [2006.07.25]

3.5.4.3 Advanced Practitioners: may Bench Assist more than one class for credit prior to completing ITS Part I [2011.07.19]

3.5.4.4 Complete 6-12 Bench Assists as per training program agreement

3.5.4.5 Classes are at least 16 units [2024.03.18]

3.5.4.6 Class days do not need to be consecutive [2024.03.18]

3.5.4.7 All Bench Assists must be in Phase 4 classes [2004.09.30] [2024.04.18]
[see Section 6 Definitions]

3.5.4.8 At least 5 Bench Assists must be in Standard Phase 4 classes [2004.09.30] [2024.03.18]
[see Section 6 Definitions]

3.5.4.9 At least three Bench Assists must include demonstrations/presentations [2011.07.19]

3.5.4.10 Bench Assists before ITS Part I may not include classroom demonstrations/presentations [2006.07.25] [2024.03.18]

3.5.4.11 A minimum of five Bench Assists must be completed after completing ITS Part I [2006.07.25]

3.5.4.12 Trainee must work with at least two instructors throughout their Bench Assists and Co-Teaches [2006.07.25] [2011.07.19]

3.5.5 Associate Instructor Evolvement

3.5.5.1 Has been approved as an Advanced Practitioner

3.5.5.2 Completed ITS Part I

3.5.5.3 Completed 6-12 Bench Assists

3.5.5.4 Evolvement submission includes:

3.5.5.4.1 Associate Instructor evolvement request form

3.5.5.4.2 ITS Part I agreement form

3.5.5.4.3 One evolvement recommendation form from advisor who has experienced the trainee's work in the classroom including demonstrations/presentations [2024.04.18]

3.5.5.4.4 One evolvement recommendation form from an instructor who has experienced the trainee's work in the classroom including demonstrations/presentations [2024.04.18]

3.5.5.4.5 Associate Instructor portion of the Instructor Training Program Record [2025.09.02]

3.5.5.4.6 All Bench Assist self-evaluation forms from applicant, at least 3 with demonstrations/presentations (fulfilling the number from applicant's requirements on their ITS agreement form)

3.5.5.4.7 All Bench Assist evaluation of trainee forms from Supervising Instructor(s), at least 3 with demonstrations/presentations (fulfilling the number from applicant's requirements on their ITS agreement form)

3.5.5.5 Submission materials emailed to SOBI office for next Instructor Review Committee cycle

[see IRC section for submission dates)

3.5.5.6 Evolvement fee paid

3.5.5.7 IRC sends recommendations to SOBI office for Board of Directors review

3.5.5.8 Recommendations reviewed by Board; applicant is notified of Board's decision

3.5.6 Co-Teaching Guidelines

3.5.6.1 All Co-Teaches must be completed with qualified SOBI instructors or international instructors approved under the international policy

[see What Level of Instructors and Experience Can Train Instructors]

[2025.09.02]

3.5.6.2 Before co-teaching the trainee must have:

3.5.6.2.1 Completed all Bench Assists,

3.5.6.2.2 Completed ITS Part I, and

3.5.6.2.3 Been approved as an Associate Instructor

3.5.6.3 Complete 3-6 Co-Teaches as per training program agreement [2024.03.18]

3.5.6.4 Classes are at least 16 units [2024.03.18]

3.5.6.5 Class days do not need to be consecutive [2024.03.18]

3.5.6.6 All Co-Teaches must be in Phase 4 classes [2004.09.30] [2024.04.18]

[see Section 6 Definitions]

3.5.6.7 At least 3 Co-Teaches must be in Standard Phase 4 classes [2004.09.30] [2024.03.18]

[see Section 6 Definitions]

3.5.6.8 Two trainees may not Co-Teach during the same class [2024.03.18]

3.5.6.9 A trainee must Bench Assist the class before co-teaching the class [2004.09.30]

3.5.6.10 Trainee must work with at least two instructors throughout their Bench Assists and Co-Teaches [2006.07.25] [2011.07.19]

3.5.7 Supervised Teach Guidelines

3.5.7.1 All Supervised Teaches must be completed with qualified SOBI instructors

[see What Level of Instructors and Experience Can Train Instructors]

3.5.7.2 Trainee must have completed all required Co-Teaches [2024.03.18]

3.5.7.3 Complete 1-2 Supervised Teaches as per training program agreement [2024.03.18]

3.5.7.4 Must be a Standard Phase 4 class of at least 16 units [2004.09.30] [2024.03.18]

[see Section 6 Definitions]

3.5.7.5 Trainee is responsible for every aspect of the class

3.5.7.6 Publicity for Supervised Teach must be clearly identified as a Supervised Teach

3.5.7.7 Supervising Instructor has 2 years of active teaching experience

3.5.7.8 Supervising Instructor must attend the class in real time [2025.09.02]

3.5.7.9 Supervising Instructor is in the observer role

3.5.7.10 Supervising Instructor will evaluate the trainee's performance for recommendation to evolve or complete an additional Supervised Teach

3.5.7.11 Online Supervised Teaches may be allowed as exceptions [2024.03.18]

3.5.7.11.1 Trainee and students must be in person, Supervising Instructor must be live online [2024.03.18]

3.5.7.11.2 Supervising Instructor must have experienced the trainee's work in the classroom including demonstrations/presentations at the trainee's current training level [2025.09.02]

3.5.7.11.3 Circumstances must exist that necessitate an online Supervised Teach [2024.03.18]

3.5.7.11.4 Must be approved by the IRC and the trainee's advisor [2024.03.18]

3.5.8 Instructor Evolvement

3.5.8.1 Completed all forms and requirements

3.5.8.2 Evolvement submission includes:

3.5.8.2.1 Evolvement request form from applicant

3.5.8.2.2 ITS Part I and Part II agreement forms

3.5.8.2.3 One evolvement recommendation form from advisor who has experienced the trainee's work in the classroom including demonstrations/presentations [2024.04.18]

3.5.8.2.4 One evolvement recommendation form from an instructor who has experienced the trainee's work in the classroom including demonstrations/presentations [2024.04.18]

3.5.8.2.5 Instructor Training Program Record form

3.5.8.2.6 All Bench Assist, Co-Teach, and Supervised Teach self-evaluation forms from applicant (fulfilling the number from applicant's requirements on their ITS agreement forms)

3.5.8.2.7 All Bench Assist, Co-Teach, and Supervised Teach evaluation of trainee forms from Supervising Instructors (fulfilling the number from applicant's requirements on their ITS agreement forms)

3.5.8.3 Submission materials emailed to SOBI office for next Instructor Review Committee cycle

[see IRC section for submission dates]

3.5.8.4 IRC sends recommendations to SOBI office for Board of Directors review

3.5.8.5 Recommendations reviewed by Board; applicant is notified of Board's decision

3.5.8.6 Applicant must have their evolvement approved before teaching a class as an Instructor [2025.09.02]

3.5.8.7 Applicant may continue to teach study groups (which they are approved to teach as an Associate Instructor) [2025.09.02]

3.6 Advanced Instructor Training Program

3.6.1 Advisor Guidelines and Responsibilities

3.6.1.1 Responsible to review and understand the most current Advanced Instructor Training Program policies and handbook

3.6.1.2 Recommends applicant when applying to the Advanced Instructor Training Program

3.6.1.3 Responsible to review trainee's submissions, including applications, and confirm curriculum requirements have been met at each level of training

3.6.1.4 Review and confirm paperwork is in order for trainee at each level

3.6.1.5 Mentors and supports trainee through their program, benching and co- teaching when possible

3.6.1.6 Confirms trainee works with at least two instructors throughout their Bench Assists and Co-Teaches

3.6.1.7 Recommends applicant to evolve to Associate Advanced Instructor

3.6.1.8 Confirms Supervised Teach is clearly identified as a Supervised Teach

3.6.1.9 Work with trainee to get in-person Supervised Teach [2025.09.02]

3.6.1.9.1 If in-person Supervised Teach is not possible, will work with IRC and trainee to confirm if online Supervised Teach will be allowed [2025.09.02]

3.6.1.10 Recommends applicant to evolve to Advanced Instructor

3.6.1.11 Receives copy of trainee's application and training documentation throughout the process

3.6.1.12 Will be contact for Instructor Review Committee or Board for applicant if there are questions.

3.6.2 Transition to Current Advanced Instructor Training Program

For those in Advanced Training Program prior to October 8, 2011

3.6.2.1 Trainee does not need to complete application if they are already enrolled in Advanced Instructor Training [2011.10.08]

3.6.2.2 Trainee's current title stays the same until the Trainee evolves per the program [2011.10.08]

3.6.2.3 All training prior to October 8, 2011 applies to the requirements of this program [2011.10.08]

3.6.2.3.1 Letters from Trainee's Advisors documenting what requirements have been fulfilled will substitute for bench forms [2011.10.08]

3.6.2.3.2 These classes do need to be listed on the Program Record form [2011.10.08]

3.6.2.4 All training done after October 8, 2011 will need to be documented using the current Advanced Instructor Training Program forms [2011.10.08]

3.6.3 Applying to the Advanced Instructor Training Program

3.6.3.1 Applicant requirements:

3.6.3.1.1 Current Instructor member of SOBI in good standing

3.6.3.1.2 Remains a member of SOBI in good standing throughout their training [2025.09.02]

3.6.3.1.3 Minimum two years of active teaching experience [2025.09.02]

3.6.3.1.4 Minimum 12 Ortho-Bionomy classes taught

3.6.3.1.4.1 Must include the following:

3.6.3.1.4.1.1 Standard Phase IV, having taught each section of the body [2025.09.02]

3.6.3.1.4.1.2 Exploration of Movement Patterns

3.6.3.1.4.1.3 Postural Re-Education and Post Techniques

3.6.3.1.4.1.4 Isometrics and Isotonics

3.6.3.1.4.2 Classes may also include In-Depth/Non-Standard Phase IV [2025.09.02]

3.6.3.1.4.3 No other classes count for these requirements [2025.09.02]

3.6.3.1.4.4 Classes are at least 16 units each [2025.09.02]

3.6.3.1.4.5 Class days do not need to be consecutive [2025.09.02]

3.6.3.1.4.6 Up to 9 of the classes may be Collaborative/Team Teaches [see Section 6 Definitions]. At least 3 of the 12 classes must be taught solo; recommended at least 6 be taught solo [2025.09.02]

3.6.3.1.4.7 Co-Teaches do not count toward these class requirement [2025.09.02] [see Section 6 Definitions]

3.6.3.2 Application submission includes:

3.6.3.2.1 Typed answers to essay questions

3.6.3.2.2 Advisor selection form [2025.09.02]

3.6.3.2.3 Two advisor recommendation forms

3.6.3.2.3.1 At least one advisor must be an Advanced Instructor [2025.12.27]

3.6.3.2.4 Documentation of Ortho-Bionomy classes taught [2025.09.02]

3.6.3.3 Submission materials emailed to SOBI office for next Instructor Review Committee cycle
[see IRC section for cycle dates]

3.6.3.4 Application fee paid

3.6.3.5 IRC sends recommendations to SOBI office for Board of Directors review

3.6.3.6 Recommendations reviewed by Board; applicant is notified of Board's decision

3.6.4 Associate Advanced Instructor Training

3.6.4.1 All coursework is based on 16 units of class

3.6.4.2 Trainee's advisors may require more than stated minimums

3.6.4.3 All Bench Assists and Co-Teaches must be completed with qualified SOBI instructors or international instructors approved under the international policy
[see What Level of Instructors and Experience Can Train Associate Advanced Instructors]
[2025.09.02]

3.6.4.4 All Supervised Teaches must be completed with qualified SOBI instructors
[see What Level of Instructors and Experience Can Train Associate Advanced Instructors]
[2025.09.02]

3.6.4.5 **Phase V Curriculum** includes minimum of:

3.6.4.5.1 Minimum two Bench Assists

3.6.4.5.2 Minimum two Co-Teaches

3.6.4.5.2.1 Trainee must have completed the minimum required Bench Assists [2025.09.02]

3.6.4.5.2.2 Two trainees may not Co-Teach during the same class

3.6.4.5.3 Trainee must work with at least two instructors throughout their Bench Assists and Co-Teaches [2025.09.02]

3.6.4.5.4 Minimum one Supervised Teach

3.6.4.5.4.1 Trainee must have completed all required Co-Teaches [2025.09.02]

3.6.4.5.4.2 Trainee is responsible for every aspect of the class

3.6.4.5.4.3 Publicity for Supervised Teach must be clearly identified as a Supervised Teach [2025.09.02]

3.6.4.5.4.4 Supervising Instructor must attend the class in real time [2025.09.02]

3.6.4.5.4.5 Supervising Instructor is in the observer role

3.6.4.5.4.6 Supervising Instructor will evaluate trainee's performance for recommendation to evolve or to complete an additional Supervised Teach [2011.10.08]

3.6.4.5.4.7 Online Supervised Teaches may be allowed as exceptions

3.6.4.5.4.7.1 Trainee and students must be in person; Supervising Instructor must be live online

3.6.4.5.4.7.2 Supervising Instructor must have experienced the trainee's work in the classroom including demonstrations/presentations at the trainee's current training level

3.6.4.5.4.7.3 Circumstances must exist that necessitate an online Supervised Teach

3.6.4.5.4.7.4 Must be approved by the IRC and the trainee's advisor

[2025.09.02]

3.6.4.5.5 Residentials count as one class/experience

3.6.4.6 Associate Advanced Instructor Evolvement

3.6.4.6.1 Completed all Phase 5 forms and requirements

3.6.4.6.2 Evolvement submission includes:

3.6.4.6.2.1 Evolvement request form from applicant

3.6.4.6.2.2 Phase 5 agreement form

3.6.4.6.2.3 Evolvement recommendation forms from advisors (minimum 2) who have experienced the trainee's work in the classroom including demonstrations/presentations [2025.09.02]

3.6.4.6.2.4 Associate Advanced Instructor Training Program record form

3.6.4.6.2.5 All Phase 5 Bench Assist, Co-Teach, and Supervised Teach self-evaluation forms from applicant (fulfilling the number from applicant's requirements on their Phase 5 program agreement form)

3.6.4.6.2.6 All Phase 5 Bench Assist, Co-Teach, and Supervised Teach evaluation of trainee forms from Supervising Instructors (fulfilling the number from applicant's requirements on their Phase 5 program agreement form)

3.6.4.6.3 Submission materials emailed to SOBI office for next Instructor Review Committee cycle

[see IRC section for cycle dates]

3.6.4.6.4 Evolvement fee paid

3.6.4.6.5 IRC sends recommendations to SOBI office for Board of Directors review

3.6.4.6.6 Recommendations reviewed by Board; applicant is notified of Board's decision

3.6.4.6.7 Trainees must have their evolvement approved before teaching as an Associate Advanced Instructor

3.6.4.7 Timeline of Phase 5 and Phase 6 Training May Overlap

3.6.4.7.1 After a minimum of two Phase 5 Bench Assists, trainee may begin bench assisting Phase 6 classes for credit

3.6.5 Advanced Instructor Training

3.6.5.1 All coursework is based on 16 units of class

3.6.5.2 Trainee's advisors may require more than stated minimums

3.6.5.3 All Bench Assists and Co-Teaches must be completed with qualified SOBI instructors or international instructors approved under the international policy
[see What Level of Instructors and Experience Can Train Advanced Instructors]
[2025.09.02]

3.6.5.4 All Supervised Teaches must be completed with qualified SOBI instructors
[see What Level of Instructors and Experience Can Train Advanced Instructors]
[2025.09.02]

3.6.5.5 **Phase VI Curriculum** includes minimum of:

3.6.5.5.1 Minimum two Bench Assists

3.6.5.5.2 Minimum two Co-Teaches

3.6.5.5.2.1 Trainee must have been approved as an Associate Advanced Instructor

3.6.5.5.2.2 Trainee must have completed the minimum required Bench Assists [2025.09.02]

3.6.5.5.2.3 Two trainees may not Co-Teach during the same class

3.6.5.5.3 Trainee must work with at least two instructors throughout their Bench Assists and Co-Teaches [2025.09.02]

3.6.5.5.4 Minimum one Supervised Teach

3.6.5.5.4.1 Trainee must have completed all required Co-Teaches [2025.09.02]

3.6.5.5.4.2 Trainee is responsible for every aspect of the class

3.6.5.5.4.3 Publicity for Supervised Teach must be clearly identified as a Supervised Teach [2025.09.02]

3.6.5.5.4.4 Supervising Instructor must attend the class in real time [2025.09.02]

3.6.5.5.4.5 Supervising Instructor is in the observer role

3.6.5.5.4.6 Supervising Instructor will evaluate trainee's performance for recommendation to evolve or to complete an additional Supervised Teach

3.6.5.5.4.7 Online Supervised Teaches may be allowed as exceptions

3.6.5.5.4.7.1 Trainee and students must be in person; Supervising Instructor must be live online

3.6.5.5.4.7.2 Supervising Instructor must have experienced the trainee's work in the classroom including demonstrations/presentations at the trainee's current training level

3.6.5.5.4.7.3 Circumstances must exist that necessitate an online Supervised Teach

3.6.5.5.4.7.4 Must be approved by the IRC and the trainee's advisor

[2025.09.02]

3.6.5.5.5 Residentials count as one class/experience

3.6.5.6 Advanced Instructor Evolvement

3.6.5.6.1 Evolved to Associate Advanced Instructor and completed all Phase 6 forms and requirements

3.6.5.6.2 Evolvement submission includes:

3.6.5.6.2.1 Evolvement request form from applicant

3.6.5.6.2.2 Phase 6 agreement form

3.6.5.6.2.3 Evolvement recommendation forms from advisors (minimum 2) who have experienced the trainee's work in the classroom including demonstrations/presentations [2025.09.02]

3.6.5.6.2.4 Advanced Instructor Training Program record form

3.6.5.6.2.5 All Phase 6 Bench Assist, Co-Teach, and Supervised Teach self-evaluation forms from applicant (fulfilling number from applicant's requirements on their Phase 6 agreement form)

3.6.5.6.2.6 All Phase 6 Bench Assist, Co-Teach, and Supervised Teach evaluation of trainee forms from Supervising Instructors (fulfilling number from applicant's requirements on their Phase 6 agreement form)

3.6.5.6.3 Submission materials emailed to SOBI office for next Instructor Review Committee cycle

[see IRC section for submission dates]

3.6.5.6.4 IRC sends recommendations to SOBI office for Board of Directors review

3.6.5.6.5 Recommendations reviewed by Board; applicant is notified of Board's decision

3.6.5.6.6 Trainees must have their evolvement approved before teaching as an Advanced Instructor

3.7 International Instructor Membership and Training

See General Policy Section 1 for policy on reciprocity in International membership and training

Section 4: Trademark Policy

4.1 Trademarks owned by SOBI

The Society owns three registered trademarks

4.1.1 Ortho-Bionomy®

4.1.2 Society of Ortho-Bionomy International®

4.1.3 Sand Dollar Design

[1998.09.15}

4.2 Trademark Usage

4.2.1 Usage by Member Level:

4.2.1.1 **Student members** can:

4.2.1.1.1 State they are a Student member of the Society of Ortho-Bionomy International [2026.06.01]

4.2.1.1.2 Not use any of the Society's trademarks outside of stating they are a Student member [2026.06.01]

4.2.1.2 **Associate members** can:

4.2.1.2.1 State they are a member of the Society of Ortho-Bionomy International

4.2.1.2.2 Use the term Ortho-Bionomy in promotional material on a list of modalities

4.2.1.3 **Professional members** (Practitioner, Advanced Practitioner, all Instructor levels) can use the registered Trademarks:

4.2.1.3.1 Ortho-Bionomy® Society of Ortho-Bionomy International®

4.2.1.3.2 Sand Dollar Design

4.2.1.3.3 Use Ortho-Bionomy Registered Practitioner

4.2.1.3.4 Cannot use the Trademarks as a personal logo

4.2.1.3.5 Cannot modify the Trademark

[1998.09.15]

4.2.2 Usage of Trademark Type of Trademark:

4.2.2.1 Society of Ortho-Bionomy International® by members

4.2.2.2 **Sand Dollar** by Practitioner, Advanced Practitioner, and all levels of Instructor members

4.2.2.3 **Ortho-Bionomy®** by Associate members, if included on a list with other modalities

4.2.2.4 **Ortho-Bionomy®** by Practitioner, Advanced Practitioner and all levels of Instructor members

[1998.09.15]

4.2.3 Marketing Usage

4.2.3.1 General Usage

Require the following statement of registration/ownership and use notice in a conspicuous position, such as the first page at the bottom of a document or near the trademark: - The registered trademarks

4.2.3.1.1 Include Use of the registered "®" symbol – and

4.2.3.1.2 Include 1 of the 5 statement options below:

4.2.3.1.2.1 Society of Ortho-Bionomy International® is a registered trademark that indicates membership in the Society, and is used with permission. [2026.06.01]

4.2.3.1.2.2 Ortho-Bionomy® is a registered trademark of the Society of Ortho-Bionomy International, Inc. and is used with permission.

4.2.3.1.2.3 The Sand Dollar design is a registered trademark of the Society of Ortho-Bionomy International, Inc. and is used with permission.

4.2.3.1.2.4 Ortho-Bionomy® and the Sand Dollar design are registered trademarks of the Society of Ortho-Bionomy International, Inc. and are used with permission.

4.2.3.1.2.5 Ortho Bionomy®, the Sand Dollar design, and Society of Ortho-Bionomy International® are registered trademarks of the Society of Ortho-Bionomy International, Inc. and are used with permission.

4.2.3.2 Marketing Use Not Requiring Permission Statements

4.2.3.2.1 Business Cards

4.2.3.2.1.1 Associate Members to Advanced Instructors may use the word Ortho-Bionomy® on business cards

4.2.3.2.1.2 No statement of registration required, though must use the registered ® symbol

4.2.3.2.2 Social Media

4.2.3.2.2.1 Associate Members to Advanced Instructors may use the words Ortho-Bionomy® and Society of Ortho-Bionomy International® on social media content

4.2.3.2.2.2 Content may not be for sale without authorization from SOBI

No statement of registration required, though must use the registered ® symbol

[2026.06.01]

4.2.3.3 Other Trademark use requires authorization, including:

4.2.3.3.1 Instructional material for sale

4.2.3.3.2 Video or audio recordings for sale

4.2.3.3.3 Merchandise for sale

4.2.3.3.4 Other uses not listed above

4.2.3.4 Trademark may only be used by Society members to promote or sell services similar to the services of the Society

[1998.09.15]

4.3 Trademark Violation

4.3.1 Trademark - Society encourages members to report improper use of Society's trademarks

[1998.09.15]

4.3.2 Violations – Automatic grievance is applied after:

4.3.2.1 3 trademark violations with notification – or –

4.3.2.2 After 90 days with no correction of violation after notice [2006.06.26]

Section 5: Online Class Policy

Established 2021.2.26

5.1 Instructor & Class Requirements

5.1.1 Explanation of Requirements

5.1.1.1 All instructors teaching Ortho-Bionomy's required classes in the Practitioner (PTP) and Advanced Practitioner (APTP) Training Programs must explain to the students that online instruction cannot replace the hands-on experience from in-person classes and must print the following statement on all class handouts: *"Online instruction cannot replace the hands-on experience from in person classes, and students should seek out extra support from an instructor or their advisor as needed."*

5.1.1.1.1 All Online classes require real-time instructor interaction and are to be documented as "Online" on certificates and on the program record form.

5.1.1.1.2 Online classes require that all students have their video turned on for the entire class. Exceptions can be made in situations of extreme technological limitations, at the Instructor's discretion. [2023.8.14]

5.1.1.1.3 Online classes with Instructor interaction taken before May 1, 2021, will be granted full credit with Advisor's approval.

5.2 Classifications of Required Classes

5.2.1 Group 1

5.2.1.1 Hands-on Classes: Phase 4, Exploration of Movement, Isometrics, Phase 5, Phase 6, Postural Re-Education and Post Techniques, and Chapman's Reflexes. The Group 1 classes have credit restrictions listed below.

5.2.2 Group 2

5.2.2.1 Practitioner Training Seminar, Demonstration Skills, Elements of a Successful Practice, Anatomy and Physiology, Phase 7, and Ethics and Emotional Issues.

5.2.3 Group 3

5.2.3.1 Cranial, Residential, feedback sessions, and evaluation sessions must be in person.

5.2.4 Group 4

5.2.4.1 The Society of Ortho-Bionomy International (SOBI) online conference may be credited as if there were real-time instructor interaction. The SOBI online conference is the only exception to the real-time instructor requirement. [2021.07.09]

5.3 Training Programs

5.3.1 Associate Training

5.3.1.1 One online class from Group 1 can be used as an elective.

5.3.1.2 Any of the ethics options may be taken online. [2026.02.20]

5.3.2 Practitioner Training Program (PTP)

5.3.2.1 32 units of Group 1 classes can be online. This is 20% of the 160-unit PTP hands-on requirement.

5.3.2.2 Full credit will be given for Group 2 online classes.

5.3.2.3 A maximum of 3 online Study Groups (9 units) may be taken online.

5.3.2.3.1 With advisor approval, more online Study Groups may be taken and credited as consultations.

5.3.2.4 With advisor approval, online classes taken that exceed the PTP requirements may be rolled over into the Advanced Practitioner Training Program as electives.

5.3.3 Advanced Practitioner Training Program (APTP)

5.3.3.1 32 units of Group 1 classes can be online. This is 23.5% of the 136-unit APTP hands-on requirement.

5.3.3.2 Full credit will be given for Group 2 online classes.

5.3.3.3 42 units of Elective classes may be online. This is 35% of the 120-unit Electives requirement.

5.3.3.4 A maximum of 6 online Study Groups (18 units) may be taken online.

5.3.3.4.1 With advisor approval, more online Study Groups may be taken and credited as consultations.

5.3.3.5 Fifteen documented sessions may be live online sessions. This is 10% of the 150-unit documented sessions requirement.

5.3.4 Instructor Training Program

5.3.4.1 A maximum of two online Bench Assists and one online Co-Teach are allowed.

5.3.4.2 With advisor approval, exceptions could be made to include more online Bench Assists.

5.3.4.3 One online ITS is allowed, either Part I or Part II. [2024.03.18]

5.3.5 Advanced Instructor Training Program

5.3.5.1 A maximum of two online Bench Assists and one online Co-Teach are allowed for Associate Advanced and Advanced Instructor training combined. [2026.02.20]

5.3.5.2 With advisor approval, exceptions could be made to include more online Bench Assists.

Section 6:Addendum

6.1 Abbreviations Key and Definition:

BoD - Board of Directors
CRC - Curriculum Review Committee
IRC - Instructor Review Committee
ITS - Instructor Training Seminar
PRC - Practitioner Review Committee
PTP - Practitioner Training Program

6.2 Definitions

6.2.1 Classes

6.2.1.1 **Unit:** 1 class unit is 1 hour (class units do not include lunches or homework but may include breaks) [2024.03.18]

6.2.1.2 **Phase 4 Classes:** Standard Phase 4, Postural Re-Education & Post Techniques, Isometrics & Isotonics, Exploration of Movement Patterns, Ortho-Bionomy Self-Care, In-Depth Phase 4, and Non-Standard Phase 4 [2024.04.18]

6.2.1.3 **Standard Phase 4:** Phase 4 techniques for the major structures of the body. Each instructor is responsible to know Standard Phase 4 techniques. Phase 4 Spine, Phase 4 Extremities, and Phase 4 Whole Body are Standard classes. Titles of Standard Phase 4 classes may differ and content may have some minor variation, but are essentially the same in any registered Ortho-Bionomy instructor classroom. Standard Phase 4 classes may include techniques for: cervical, thoracic, and lumbar spine; ribs; psoas; ilium; sacrum; femur; knee; ankle; foot; shoulder; elbow; wrist; and hand. [2024.03.18] [2025.09.02]

6.2.1.4 **In-Depth and Non-Standard Phase 4:** Classes for areas of the body that are based on more in-depth anatomy or methods that go beyond the standard material while still staying within Phase 4. These may be developed by the instructor in their practice or learned elsewhere. These may be different based

on the instructor teaching them, yet all share the commonality of Phase 4 principles and techniques. [2024.03.18]

6.2.1.5 **Ortho-Bionomy Self-Care:** Techniques using Ortho-Bionomy principles for self-correction, which demonstrate how participants can facilitate release of structural imbalances and discomfort within themselves. [2025.09.02]

6.2.1.6 **Blended Phases and Advanced:** Classes that specifically combine more than one Phase in a single class. Taught only by Associate Advanced Instructors (approved levels only) and Advanced Instructors. These classes will be credited as electives. [2024.03.18]

6.2.2 Practitioner and Advanced Practitioner

6.2.2.1 **Supervised Demonstration:** A Supervised Demonstration is a lecture/presentation of Ortho-Bionomy given by the trainee and observed and documented by a Supervising Instructor. [2024.03.18]

6.2.3 Instructor and Advanced Instructor

6.2.3.1 **Active Teaching:** Minimum of three classes taught per year. This definition is used in Instructor Training and Advanced Instructor Training advising/supervising requirements. This definition does not apply to instructor membership status. [2013.02.01] [2024.03.18]

6.2.3.2 **Observation/Bench Assist:** Bench Assisting is the first stage of learning to teach a class and can range from observation only to assisting at tables during practice to teaching demos during class. [2024.03.18]

6.2.3.3 **Co-Teach:** Part of Instructor Training, Advanced Instructor Training, and the approval process to teach certain classes after becoming an instructor. A Co-Teach includes all aspects of teaching the class. The trainee/instructor co-teacher is responsible for at least half of all aspects of teaching the class. Only one trainee may Co-Teach per class. [2024.03.18] [2025.09.02]

6.2.3.4 **Collaborative/Team Teach:** Two instructors who are teaching together, not as part of a training or approval process. The use of the term co-teach does not apply. During a Collaborative/Team Teach each instructor may only teach material based on the classes they have been approved to teach. Collaborative/Team Teaches do not count for credit in the Instructor or Advanced Instructor Training Programs. [2024.03.18] [2025.09.02]

6.2.3.5 **Supervised Teach:** An Ortho-Bionomy class presented by a trainee and supervised by a Supervising Instructor. During a Supervised Teach, a trainee is responsible for every aspect of the class. [2024.03.18]

6.2.3.6 **Supervising Instructor:** The instructor who supervises a Supervised Demonstration, Bench Assist, Co-Teach, or Supervised Teach.

During a Supervised Demonstration, the Supervising Instructor observes and evaluates the demonstration skills of the trainee and writes a documentation letter.

During Bench Assists and Co-Teaches the Supervising Instructor is ultimately responsible for the learning experience of the students in the class as well as for giving feedback to the trainee/instructor who is doing the Bench Assist or Co-Teach.

After a Co-Teach to add a class, the Supervising Instructor determines if the instructor is qualified to teach that class solo and if so, provides a letter of approval.

During a Supervised Teach the Supervising Instructor is completely in the role of observing a trainee's teaching, giving feedback outside of class, and writing an evaluation. During a Supervised Teach class credit is given to the students by the Supervising Instructor. [2024.03.18] [2025.09.02]

6.2.4 General

6.2.4.1 **In Good Standing** – Current member, dues paid, no grievances, signed trademark, Code of Ethics agreements on file. Instructor members also must have signed Instructor/Board agreement on file

6.2.4.2 **Terminology Clarification—"instructor" vs "Instructor"**

In this policy document, the term "instructor" (lowercase) is designated to encompass the entire instructor community in SOBI, which includes: Associate Instructors, Instructors, Associate Advanced Instructors, and Advanced Instructors.

The term "Instructor" (capitalized) is designated to refer to a specific member level within SOBI. All specific member levels are capitalized.

The exception to the capitalization and lowercase distinction is when the overall format of the policy dictates capitalization; for example, when used in a section title or at the beginning of a sentence.

This distinction is necessary for clarity in interpreting roles, responsibilities, and privileges within the policies [2025.07.28]

6.2.4.3 **Policy** – Protocol, requirements, definition or rules to be followed

6.2.4.4 **Procedure** – Actions, operations, function, methods or steps followed to execute protocol

6.2.4.5 **SOBI Administrative Policy (Admin)** – Protocol utilized to define the organization's structure

6.2.4.6 **SOBI Training Policy (Train)** – Protocol utilized to define SOBI training

6.3 Date Format

Dates in the policy are formatted yyyy.mm.dd

Dates that follow a policy section indicate when that section was either created or revised

6.4 Miscellaneous Information

These Policies have been pulled from their original documents and placed into a numbered format.

Note: There are instances where procedure is included in this Policy document, to provide clarity of the Policy.