

# Society of Ortho-Bionomy International®

## Policy Manual

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The logo for Ortho-Bionomy, featuring the word "Ortho-Bionomy" in a stylized, cursive script font. The "O" in "Ortho" is large and loops around the "B" in "Bionomy". A registered trademark symbol (®) is at the end.

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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

Revision Date: 2006.03.20 Bylaws

#### **1.1.2 Number**

There shall be seven board members

Revision Date: 1996.04.01 Bylaws

#### **1.1.3 Term**

Term length is three years or until a successor is elected or qualified

Revision Date: 1996.04.01 Bylaws

#### **1.1.4 Member Level**

Three Board members must be Instructor level members

Revision Date: 1996.04.01 Bylaws

#### **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.

Revision Date: 2011.01.01 Bylaws

Revision Date to reflect Indiana Incorporation, not California: 2022.4.18

#### **1.1.6 Compensation | Reimbursement**

Compensation/Reimbursement for expenses determined by Board of Directors.

Revision Date: 2011.01.01 Bylaws

#### **1.1.7 Officers**

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

Revision Date: 2011.01.01 Bylaws

**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

Revision Date: 2011.01.01 Bylaws

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

Revision Date: 2011.01.01 Bylaws

**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

Revision Date: 2017.10.03

**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

Revision Date: 2011.01.01

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

Revision Date: 2011.01.01 Bylaws

#### **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)

Revision Date: 2011.01.01 Bylaws

#### **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

Revision Date: 2011.01.01 Bylaws

#### **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

Revision Date: 2011.01.01 Bylaws

#### **1.1.11 Number of Board of Directors Change**

Can only be changed by a majority vote of members

Revision Date: 2011.01.01 Bylaws

#### **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).

Revision Date: 2011.01.01 Bylaws

#### **1.1.13 Indemnification**

**1.1.13.1** Corporation can indemnify person that was agent of corporation

Revision Date: 2011.01.01 Bylaws

#### **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.

Revision Date: None Listed

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

(Note: This policy repeats in section 3.3)

**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** Familiarize self with the Ortho-Bionomy Training Programs and handbooks.

**1.1.15.1.4** Review the Training Programs annually and familiarize myself with changes

**1.1.15.1.5** Advise trainees on Training Programs I am familiar with

**1.1.15.1.6** Teach courses for which I have been trained to teach

**1.1.15.1.7** Send in class lists to the Office to be input into the transcript database

**1.1.15.1.8** Follow the SOBI Policies

**1.1.15.1.9** Communicate with Board liaison or SOBI Office 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** Biannually complete and submit proof of Continuing Education
- 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** Notify Instructors of their and their trainees involvements
- 1.1.15.2.8** Notify the Instructors of changes or updates of Training Program/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 Liaison/Contact on the SOBI Board
- 1.1.15.2.12** Not sell or market class or member information
- 1.1.15.2.13** Provide web-space for marketing Registered Ortho-Bionomy classes
- 1.1.15.2.14** Support Instructors, including study groups through SOBI Office and other expanded ways for Instructors to teach
- 1.1.15.2.15** Provide web-space for Instructors to promote themselves and their work
- 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 of our Instructors
- 1.1.15.2.18** Actively facilitate the resolution of complaints and grievances

Revision Date: 2016.05.16

## **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

Revision: 1987.10.01 Code of Ethics

## **1.2.2 Meetings**

### **1.2.2.1 Annual Meeting**

Annual meeting of members are scheduled by Board of Directors

Revision: 2011.01.01 Bylaws

### **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

Revision: 2011.01.01 Bylaws

## **1.2.3 Membership**

### **1.2.3.1 Membership Dues**

Membership Dues are established by the Board of Directors

Revision Date: None listed

### **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**

Revision Date: 2011.01.01 Bylaws

### **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.

Revision Date: 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

Revision Date: none listed

- 1.2.4.2** Voting is completed by ballot

Revision Date: 2011.08.28 Bylaws

- 1.2.4.3 Meeting notice** 10-90 days from meeting

Revision Date: 11-01-01 Bylaws

- 1.2.4.4 Quorum** – 10% of voting members is a quorum

Revision Date: 11-01-01 Bylaws

- 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 (10%) of voting members to approve the action

Revision Date: 11-01-01 Bylaws

- 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

Revision Date: 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

Revision date: 2023.3.2

### **1.3 International Policy**

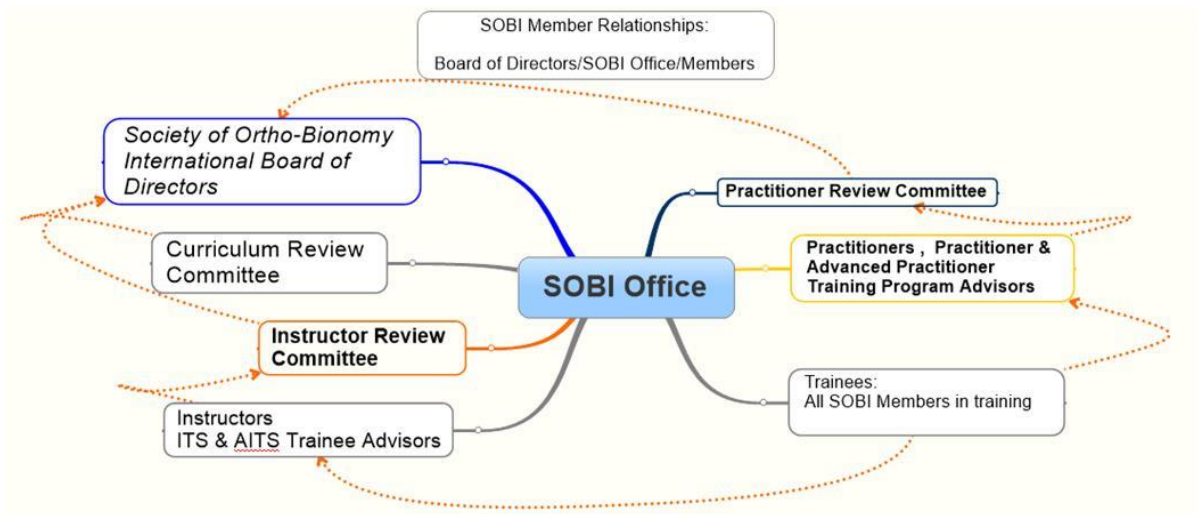
- 1.3.1** International Members – International trainees upon entering any SOBI training program must become a SOBI member. [2022.2.7]
- 1.3.2** Any Instructors teaching or training any student in a SOBI Training Program must be a SOBI Instructor in good standing, a sponsored International Instructor, or an International Instructor teaching outside of the United States. (re: 1.3.3. and 1.3.4). [2022.2.7]
- 1.3.3** Non-SOBI International Instructors teaching in the United States.
  - 1.3.3.1** Must be sponsored by a registered SOBI Instructor. [1999.4.15]
  - 1.3.3.2** Must be members in good standing of their accrediting organization. [2022.2.7]
  - 1.3.3.3** May teach core curriculum [2022.2.7]
  - 1.3.3.4** May teach an elective with approval of the SOBI Instructor sponsor and review and approval of submitted class material to the CRC. [2022.2.7]
- 1.3.4** SOBI Students may apply a maximum of 64 class hours taught by International Instructors who are registered with another Ortho-Bionomy organization. Up to 32 class hours may be applied to the Practitioner Training Program. Any remaining class hours may be applied to the Advanced Practitioner Training Program. [Revised 2022.2.7]
- 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: Practitioner and Training Policy

### 2.1 General Membership Policy Section

#### 2.1.1 Diagram of Board, Committee, and Member Relationships



**Trainees:** Members including Advanced Instructors, Instructors, Associate Instructors, Practitioners, Advanced Practitioners, Associates, Students

**Practitioners:** Practitioner and Advanced Practitioner Training Program Advisors

**Instructors:** Instructor and Advanced Instructor Training Program Advisors

Trainees send in their training program paperwork to the SOBI office to be distributed to the Instructor and Practitioner Review committees. The Instructor and Practitioner Review Committees communicate with the trainee's advisor, if there are questions on the trainee's program documentation.

#### 2.1.2 Continuing Education (CE) for Members

2.1.2.1 **Student members** pay annual dues, but do not have CE requirements

2.1.2.2 Associate members, Practitioner, Advanced Practitioner, Associate Instructors pay dues annually and complete:

2.1.2.2.1 16 units of Ortho-Bionomy coursework every two years for Associate members – Associate Instructors and includes the following options:

2.1.2.2.1.1 Complete a 16-unit Ortho-Bionomy class

2.1.2.2.1.2 Attend the SOBI conference

Revision Date: 2011.04.26

**2.1.2.3 Instructors through Advanced Instructor** levels pay dues annually and every two years complete one of the following:

**2.1.2.3.1** Co-teaching with Registered Instructor

**2.1.2.3.2** Observed/supervised teaching by Registered Instructor

**2.1.2.3.3** Attend the full SOBI Conference & Instructor Retreat

Revision Date: 2012.10.02

### **2.1.3 Class Unit**

Is approximately equal to 1 hour

Revision Date: 2011.04.26

### **2.1.4 Curriculum Review Committee** (this section repeats in policy 3.8)

**2.1.4.1** Helps evolve the Training Program Curriculum and Education policies.

**2.1.4.2** Three or five members appointed by the Board of Directors of the Society of Ortho-Bionomy International

Revision Date 2020.

**2.1.4.3** Minimum two Instructors, including one Advanced Instructor and can include one Advanced Practitioner

Revision Date 2015.09.10

**2.1.4.4** Three-year Curriculum Review Committee term

Revision Date: 2001.10.28

**2.1.4.5** Review Current Electives

Revision Date: 2006.06.27

**2.1.4.6** Approval of New Electives

Revision Date: 2006.06.27

**2.1.4.7** Curriculum Policy recommendations are sent to the Instructor community for input

Revision Date: 2001.10.28

**2.1.4.8** Submit all curriculum proposals to the Board of Directors for approval

Revision Date: 2001.10.28

**2.1.4.9** Board of Directors has the final approval in the curriculum policy approval process

Revision Date: 2001.10.28

### **2.1.5 Practitioner Review Committee**

**2.1.5.1** Practitioner Review Committee submissions due Mar. 15, Jun. 15, Sept. 15, Dec. 15

**2.1.5.2** Verify completeness of training program documentation and qualitative examination

**2.1.5.3** Reviews Practitioner Waivers, Practitioner and Advanced Practitioner Evolvment submissions

- 2.1.5.4** Practitioner Review Committee sends their recommendation to SOBI Office for Board of Directors
- 2.1.5.5** Recommendations accepted and trainees are notified
- 2.1.5.6** Committee has 3 members
- 2.1.5.7** Serve for 3 years beginning in September
- 2.1.5.8** One new member each year, one member retires
- 2.1.5.9** Board of Directors appoints committee members
- 2.1.5.10** Committee Members may be Advanced Practitioners and Instructors, with one instructor on each committee session
- 2.1.5.11** If the applicant's training program documentation is incomplete, the committee will alert the applicant's Advisor of missing material and mark their involvement request pending receipt of the missing material.

Revision Date: 2006.03.10

## **2.2 Types of Members**

### **2.2.1 Student Members**

- 2.2.1.1** Can state they are a member of the Society of Ortho-Bionomy International
- 2.2.1.2** Listed in Member Directory
- 2.2.1.3** Listed on-line Member Online Searches
- 2.2.1.4** No Continuing Education requirements

### **2.2.2 Associate Members**

- 2.2.2.1** Listed in public Ortho-Bionomy web-site searches, 'Find a Practitioner' search
- 2.2.2.2** Have publicly viewable online profile and web presence
- 2.2.2.3** May vote on Board of Director elections

### **2.2.3 Practitioner Members**

- 2.2.3.1** Listed in public Ortho-Bionomy web-site searches, 'Find a Practitioner' search
- 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** May do Self-care/homework with clients as part of session
- 2.2.3.6** May not teach Ortho-Bionomy or Ortho-Bionomy Self-care to groups/workshops
- 2.2.3.7** In Training programs
  - 2.2.3.7.1** Can give Sessions to Practitioner and Advanced Practitioner trainees
- 2.2.3.8** They cannot do Feedback Sessions, Evaluation Sessions or Consultations

### **2.2.4 Advanced Practitioner Members**

- 2.2.4.1** Vote on Board of Directors Elections and General Policy



- 2.2.4.2** Complete 16 units of Ortho-Bionomy Continuing Education every 2 years – Ortho-Bionomy class or attending full SOBI Conference
- 2.2.4.3** Listed on public OB website searches, 'Find a Practitioner', have web presence
- 2.2.4.4** May do Lecture/Demonstrations
- 2.2.4.5** May do Self-care/homework with clients as part of session
- 2.2.4.6** May not teach Ortho-Bionomy or Ortho-Bionomy Self Care to groups/workshops
- 2.2.4.7** In Training programs
  - 2.2.4.7.1** Can give Sessions to Practitioner and Advanced Practitioner trainees
- 2.2.4.8** Cannot be Advisor, or do Evaluations, Consultations, Feedback Sessions

Revision Date: 2016.12.01

## **2.3 Training Programs**

### **2.3.1 Training Program Evolvment Delay**

Training Program Evolvment Delay can be delayed by the Board of Directors until outstanding grievances are resolved.

Revision Date: 2006.06.26

### **2.3.2 Associate Training Segment of the Practitioner Training Program**

Includes completion of 114 units of Ortho-Bionomy instruction (which also counts toward the Practitioner Training Program (PTP) consisting of:

- 2.3.2.1** 32 units of Basics/Phase Four
- 2.3.2.2** 16 units of Phase Five
- 2.3.2.3** 16 units of Phase Six
- 2.3.2.4** 3, 8, 16 Units of Ethics see below for options:
  - 2.3.2.4.1** Tutorial: 3 hour Ethics Tutorial with Ortho-Bionomy Instructor
  - 2.3.2.4.2** Ethics and Emotions class – 8 or 16 unit Ortho-Bionomy Ethics class
- 2.3.2.5** Completed Electives to add up to 114 total units completed
- 2.3.2.6** The Associate units transfer directly to the Practitioner Training Program (PTP)
- 2.3.2.7** 1 session – Receive a session from a Registered Practitioner or Advanced Practitioner, or any level of Instructor (counts in the PTP)
- 2.3.2.8** 1 session - Give a session for feedback to an Instructor (counts in the PTP)
- 2.3.2.9** Paid Membership fee
- 2.3.2.10** Sent completed form to SOBI Office
- 2.3.2.11** Become an Associate once SOBI Office notifies trainee of receipt and approval

### **2.3.3 Practitioner Training Program Section**

Refer to the Practitioner Training Handbook for full Program Details and descriptions. For Clarity, the Training section also includes some procedures.

- 2.3.3.1** Entrance

**Entrance** into the Practitioner Training program

- 2.3.3.1.1** Must be a SOBI member -or-
- 2.3.3.1.2** Join as member at same time as apply to Practitioner Training Program
- 2.3.3.1.3** Pay enrollment fee

Revision Date: 2011.06.16

**2.3.3.2** Practitioner Training Program Curriculum Units

unit approx. 1 hour

- 2.3.3.2.1** 64 Phase IV
- 2.3.3.2.2** 16 Phase V
- 2.3.3.2.3** 16 Phase VI
- 2.3.3.2.4** 16 Practitioner Training Seminar
- 2.3.3.2.5** 16 Postural Re-education and Post Techniques
- 2.3.3.2.6** 16 Isometrics and Isotonics
- 2.3.3.2.7** 16 Exploration of Movement Patterns
- 2.3.3.2.8** 16 Chapman's Neurolymphatic Reflexes
- 2.3.3.2.9** 16 Ethics and Emotional Issues
- 2.3.3.2.10** 16 Demonstration Skills
- 2.3.3.2.11** 16 Elective(s)
- 2.3.3.2.12** 18 Study Group (six 3 unit min)
- 2.3.3.2.13** 40 Residential (5 day minimum)
- 2.3.3.2.14** 8 Sessions Received from Practitioner/Instructors
- 2.3.3.2.15** 3 Feedback Sessions on Advisor/Instructors
- 2.3.3.2.16** 9 Consultations with Advisor/Instructors
- 2.3.3.2.17** 3 Evaluations-Documented session on Advisor/Instructors
- 2.3.3.2.18** 1 Supervised Demonstration – Documented
- 2.3.3.2.19** 1 Essay
- 2.3.3.2.20** 150 Documented Sessions
- 2.3.3.2.21** 16 Elements of a Successful Practice (can be waived, see Practitioner Handbook)
- 2.3.3.2.22** 32 Anatomy and Physiology (can be waived, see Practitioner Handbook)

Revision Date: 2006.06.26

**2.3.3.3** Practitioner Training Program - Who can Support in your Training

Revision Date: 2016.12.01

- 2.3.3.3.1** **Advisor** – All Instructor levels, Associate Instructor through to Advanced Instructor
- 2.3.3.3.2** **Receive Sessions** from Practitioner through to Advanced Instructor
- 2.3.3.3.3** **Feedback Session** given to Associate Instructor through to Advanced Instructor

**2.3.3.3.4 Evaluation Session** given to Associate Instructor through to Advanced Instructor with at least one given to your Advisor

**2.3.3.3.5 Consultation** – Associate Instructor through to Advanced Instructor

**2.3.3.3.6 Study Group** – Associate Instructor through to Advanced Instructor

Revision Date: 2011.06.16

**2.3.3.3.7 Study Groups** – In Study Groups, Associate Instructors and Instructors may only teach materials based on the classes that they are approved to teach.

Revision Date: 2005.01.19

**2.3.3.4 Practitioner Advisor Guidelines and Responsibilities**

**2.3.3.4.1 Advisor** - Registered Associate Instructor, Instructor, Associate Advanced Instructor, Advanced Instructor

**2.3.3.4.2** Responsible to review and confirm curriculum's requirements have been met at each level of training

**2.3.3.4.3** Complete Consultations with Advisee

**2.3.3.4.4** Receive an Evaluation session from Trainee

**2.3.3.4.5** Discuss and sign-off on Waivers for Trainee, if applicable

**2.3.3.4.6** Review and confirm paperwork is in order for Trainee

**2.3.3.4.7** Recommends trainee to evolve to Practitioner

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

Revision Date: 2011.06.16

**2.3.3.5 Feedback Session details in Practitioner Program, three given to:**

**2.3.3.5.1** Registered Associate Instructor to Advanced Instructor

Revision Date: 2016.12.01

**2.3.3.5.2** 1 of the 3 feedbacks should be with your Advisor

**2.3.3.5.3** Feedbacks are written on Practitioner Training Program Record form

Revision Date: 2011.06.16

**2.3.3.6 Evaluation Sessions in Practitioner Program, three given to:**

**2.3.3.6.1** Associate Instructor through Advanced Instructor

Revision Date: 2016.12.01

**2.3.3.6.2** 1 of the 3 evaluations should be with your Advisor

**2.3.3.6.3** Evaluating advisor/instructor will write an Evaluation letter to include with training program documentation submission

Revision Date: 2011.06.16

**2.3.3.7 Waivers for Anatomy and Physiology in Practitioner Program include:**

- 2.3.3.7.1** Waiver form provided by SOBI must be filled out and submitted
- 2.3.3.7.2** Program Advisor approval
- 2.3.3.7.3** Classes/Training used for waivers include:
  - 2.3.3.7.3.1** Course completed at local college
  - 2.3.3.7.3.2** Training in Massage School with equivalent hours
  - 2.3.3.7.3.3** Professional Training in the medical field
- 2.3.3.7.4** Include letter from trainee requesting waiver
- 2.3.3.7.5** Waivers should be approved by Practitioner Review Committee prior to submitting final request for Practitioner Evolvment
- 2.3.3.7.6** See Practitioner Handbook for procedure/number of copies, etc.

Revision Date: 2007.09.01

- 2.3.3.8** Waivers for Elements of a Successful Practice in Practitioner Program Include:
  - 2.3.3.8.1** Waiver form provided by SOBI must be filled out and submitted
  - 2.3.3.8.2** Letter from Advisor supporting the waiver
  - 2.3.3.8.3** Classes/Training/Experience for waiver can include:
    - 2.3.3.8.3.1** Proof of business management and public relations experience
    - 2.3.3.8.3.2** Classes completed at college
    - 2.3.3.8.3.3** Work-related training
  - 2.3.3.8.4** Include letter from trainee requesting waiver
  - 2.3.3.8.5** Waivers should be approved by Practitioner Review Committee prior to submitting final request for Practitioner Evolvment
  - 2.3.3.8.6** See Practitioner Handbook for procedure/number of copies, etc.

Revision Date: 2007.09.01

- 2.3.3.9** Classes can't be used in both Practitioner and Advanced Practitioner Program

You may not use the same class hours in Practitioner and Advanced Practitioner Training Program

Revision Date: 2007.09.01

- 2.3.3.10** Classes are shared in Practitioner and Associate Training Programs
  - Associate and Practitioner Training classes may be shared, as Associate Training is part of the Practitioner Training Program

Revision Date: 2007.09.01

- 2.3.3.11** Animal Clientele (i.e. equine and canine) courses can be used as electives for:
  - 2.3.3.11.1** 16 units of Practitioner Training
  - 2.3.3.11.2** 32 units of Advanced Practitioner Training

Revision Date: 2018.02.09

**2.3.3.12** Consultations/Private discussions in Practitioner Training

**2.3.3.12.1** Nine consultations

**2.3.3.12.2** With Associate Instructors, Instructors or Advanced Instructors

**2.3.3.12.3** It is recommended that some be with the Trainee's advisor

Revision date: 2007.09.01

**2.3.3.13** Study Groups in Practitioner Training

**2.3.3.13.1** 6 three-hour Study Groups

**2.3.3.13.2** Can be led by Associate Instructor through to Advanced Instructor

**2.3.3.13.3** 2 of the 6 study groups can be additional classes with Advisor approval

Revision Date: 2007.09.01

**2.3.3.14** Documented Sessions for Practitioner Training

**2.3.3.14.1** 150 documented sessions of entirely Ortho-Bionomy

**2.3.3.14.2** Minimum of 20 different people

**2.3.3.14.3** Each session a minimum of 30 minutes

**2.3.3.14.4** Check in with Advisor on how to document

Revision Date: 2007.09.01

**2.3.3.15** Demonstration Requirement in Practitioner Program

**2.3.3.15.1** Given as an introduction to Ortho-Bionomy

**2.3.3.15.2** Minimum of 4 attendees

**2.3.3.15.3** Observed and documented by an Ortho-Bionomy Instructor, either in person or video

**2.3.3.15.4** Letter of documentation by Instructor for trainee's Practitioner portfolio

Revision Date: 2007.09.01

**2.3.3.16** Essay for Practitioner Training

**2.3.3.16.1** Typed essay by applicant, at least one page in length

**2.3.3.16.2** What the philosophy and principles of Ortho-Bionomy mean to the applicant personally and professionally

Revision Date: 2007.09.01

**2.3.3.17** Request for evolvement to Practitioner

**2.3.3.17.1** Completed Practitioner Evolvement Packet Includes:

**2.3.3.17.1.1** Completed Program Record form

**2.3.3.17.1.2** 3 evaluation letters

**2.3.3.17.1.3** 1 essay

**2.3.3.17.1.4** 1 letter requesting evolvement or evolvement form by applicant

**2.3.3.17.1.5** 1 letter from Instructor regarding demonstration

- 2.3.3.17.1.6** Approved Waiver form, signed by PRC Chair
- 2.3.3.17.2** Evolvment fee paid
- 2.3.3.17.3** 4 copies of training program documentation sent and 1 emailed to SOBI Office for Practitioner Committee
- 2.3.3.17.4** Practitioner Review Committee meets Mar. 15, Jun. 15, Sep. 15, Dec. 15
- 2.3.3.17.5** Practitioner Review Committee sends recommendations to SOBI Office for Board
- 2.3.3.17.6** Recommendations accepted by Board and applicants are notified

Revision Date: 2007.09.01

## **2.3.4 Advanced Practitioner Training Program**

Refer to the Advanced Practitioner Training Handbook for Program Details for Clarity, the training section also includes some procedures

- 2.3.4.1** Advanced Practitioner Program - Who can be your
  - 2.3.4.1.1** **Advisor** – Registered Associate Instructor through to Advanced Instructor
  - 2.3.4.1.2** **Receive Sessions** – Practitioner through to Advanced Instructor
  - 2.3.4.1.3** **Feedback Session** – given to Associate Instructor through to Advanced Instructor
  - 2.3.4.1.4** **Evaluation Session** – give to Associate Instructor through to Advanced Instructor
    - 2.3.4.1.4.1** At least one with Trainee’s Advisor
  - 2.3.4.1.5** **Consultation** – Associate Instructor through to Advanced Instructor
  - 2.3.4.1.6** **Study Group** – Associate Instructor through to Advanced Instructor

Revision Date: 2016.12.01

- 2.3.4.2** Advanced Practitioner Advisor Guidelines and Responsibilities
  - 2.3.4.2.1** Advisor is Associate Instructor through Advanced Instructor
  - 2.3.4.2.2** Responsible to review and confirm curriculum and program requirements have been met at each level of training
  - 2.3.4.2.3** Receive sessions from Trainee for Feedback and Evaluation
  - 2.3.4.2.4** Complete Consultations
  - 2.3.4.2.5** Review and confirm training program documentation is in order for Trainee
  - 2.3.4.2.6** Mentor and support trainee through the Advanced Practitioner Training Program
  - 2.3.4.2.7** Recommends applicant to evolve to Advanced Practitioner
  - 2.3.4.2.8** Discusses elective options – ie. Class Elective, Community Project, Research/Case Study

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

Revision Date: 2011.06.16

**2.3.4.3** Advanced Practitioner – Entrance

- 2.3.4.3.1** Must be a SOBI member in good standing
- 2.3.4.3.2** 375 units complete in Practitioner Training Program
- 2.3.4.3.3** Pay enrollment fee

Revision Date: 2011.06.16

**2.3.4.4** Advanced Practitioner Training Program Curriculum in Units  
unit approx. 1 hour

- 2.3.4.4.1** 16 Phase IV
- 2.3.4.4.2** 16 Phase V
- 2.3.4.4.3** 16 Phase VI
- 2.3.4.4.4** 8 Phase VII
- 2.3.4.4.5** 16 Postural Re-education and Post Techniques
- 2.3.4.4.6** 16 Isometrics and Isotonics
- 2.3.4.4.7** 16 Exploration of Movement Patterns
- 2.3.4.4.8** 16 Chapman's Neurolymphatic Reflexes
- 2.3.4.4.9** 16 Ethics and Emotional Issues
- 2.3.4.4.10** 16 Cranial
- 2.3.4.4.11** 120 Electives, Projects or Case Studies
- 2.3.4.4.12** 18 Study Group (six 3-unit min)
- 2.3.4.4.13** 40 Residential (5 day minimum)
- 2.3.4.4.14** 8 Sessions Received from Practitioner/Instructors
- 2.3.4.4.15** 3 Feedback Sessions on Advisor/Instructors
- 2.3.4.4.16** 8 Consultations with Advisor/Instructors
- 2.3.4.4.17** 3 Evaluations-Documented session on Advisor/Instructors
- 2.3.4.4.18** 1 Supervised Demonstration – Documented
- 2.3.4.4.19** 1 Essay
- 2.3.4.4.20** 150 Documented Sessions

Revision Date: 2006.06.26

**2.3.4.5** Feedback Session details in Advanced Practitioner Program:

- 2.3.4.5.1** Written on applicant's Advanced Practitioner Training Program Record
- 2.3.4.5.2** Complete 3 Feedback sessions
- 2.3.4.5.3** Given to Registered Instructors, including Associate Instructor
- 2.3.4.5.4** 1 of the 3 Feedbacks should be with the Trainee's Advisor

Revision Date: 2011.06.16

- 2.3.4.6** Evaluation Sessions in Advanced Practitioner Program, three given to
- 2.3.4.6.1** Associate Instructor through to Advanced Instructor
  - 2.3.4.6.2** 1 of the 3 evaluations should be with the Trainee's Advisor
  - 2.3.4.6.3** Evaluating Advisors/Instructors will type an Evaluation letter to include with the Trainee's program documentation submission

Revision Date: 2011.06.16

- 2.3.4.7** Classes can't be used in both Practitioner & Advanced Practitioner Program  
You may not use the same class hours in Practitioner and Advanced Practitioner Training Program

Note: this policy is the same as 2.3.3.9

Revision Date: 2007.09.01

- 2.3.4.8** Animal clientele (i.e. Equine and canine) courses can be used as electives for:

- 2.3.4.8.1** 16 units of Practitioner Training
- 2.3.4.8.2** 32 units of Advanced Practitioner Training

Note: this policy is the same as 2.3.3.11

Revision Date: 2018.02.09

- 2.3.4.9** Consultations/Private discussions in Advanced Practitioner Training:

- 2.3.4.9.1** Eight consultations
- 2.3.4.9.2** With Associate Instructors to Advanced Instructors
- 2.3.4.9.3** Suggest that some be with the Trainee's Advisor

Revision: 2007.09.01

- 2.3.4.10** Study Groups in Advanced Practitioner Program:

- 2.3.4.10.1** 6 three-hour Study Groups
- 2.3.4.10.2** Can be led by Associate Instructor through to Advanced Instructor
- 2.3.4.10.3** 2 of the 6 study groups can be additional classes with the Advisor's approval

Revision: 2007.09.01

- 2.3.4.11** Documented Sessions for Advanced Practitioner Training:

- 2.3.4.11.1** 150 documented sessions of entirely Ortho-Bionomy
- 2.3.4.11.2** Minimum of 20 different people
- 2.3.4.11.3** Each session a minimum of 30 minutes
- 2.3.4.11.4** Check in with Advisor on how to document

Revision: 2007.09.01

- 2.3.4.12** Electives in Advanced Practitioner Program

Options of class, project, case study or a combination of these options:



- 2.3.4.12.1** 120 units of Ortho-Bionomy classes –or–
- 2.3.4.12.2** Complete 1-5 Case studies of 4 sessions –or–
- 2.3.4.12.3** Project – Research Project or Community Service Project

Revision Date: 2011.06.16

**2.3.4.13 Documented Case Study for Advanced Practitioner Training:**

- 2.3.4.13.1** One to Five Case studies
- 2.3.4.13.2** At least 4 sessions per client/case study
- 2.3.4.13.3** Documented change in client over time
- 2.3.4.13.4** Include:
  - 2.3.4.13.4.1** Subjective complaints
  - 2.3.4.13.4.2** Medical History
  - 2.3.4.13.4.3** Objective Findings
  - 2.3.4.13.4.4** Assessment of subjective & objective findings
  - 2.3.4.13.4.5** Description of sessions
  - 2.3.4.13.4.6** Techniques used
  - 2.3.4.13.4.7** Response of client
  - 2.3.4.13.4.8** Trainee's Conclusions

- 2.3.4.13.5** Trainee to check in with Advisor on documentation

Revision Date: 2006.03.10

**2.3.4.14 Elective Projects for Advanced Practitioner Training:**

- 2.3.4.14.1** Research project or
- 2.3.4.14.2** Ortho-Bionomy related community service project
- 2.3.4.14.3** Designed by the applicant and Advisor
- 2.3.4.14.4** Include a report that can be sent with your final program documentation
- 2.3.4.14.5** Could be an academic research project
- 2.3.4.14.6** Could be community service with a specific group
- 2.3.4.14.7** Check in with Advisor on documentation
- 2.3.4.14.8** See the Advanced Practitioner Training handbook for ideas and details

Revision Date: 2006.03.10

**2.3.4.15 Demonstration requirement in Advanced Practitioner Program:**

- 2.3.4.15.1** Given as an introduction to Ortho-Bionomy
- 2.3.4.15.2** Minimum of 4 attendees
- 2.3.4.15.3** Observed and documented by an Ortho-Bionomy Instructor, either in person or video
- 2.3.4.15.4** Letter of documentation by Instructor for Advanced Practitioner portfolio

Revision Date: 2006.03.10

**2.3.4.16** Essay for Advanced Practitioner Training

**2.3.4.16.1** Typed essay by applicant, at least 1 page in length

**2.3.4.16.2** What the Philosophy and Principles of Ortho-Bionomy mean to the applicant personally and professionally

Revision: 2007.09.01

**2.3.4.17** Request for Evolvment to Advanced Practitioner:

**2.3.4.17.1** Completed Advanced Practitioner Training Program

**2.3.4.17.2** Completed Program Record form

**2.3.4.17.3** 3 typed Evaluation letters

**2.3.4.17.4** 1 essay

**2.3.4.17.5** 1 letter requesting evolvment or evolvment form by applicant

**2.3.4.17.6** 1 letter from Instructor regarding demonstration

**2.3.4.17.7** Evolvment fee

**2.3.4.17.8** 4 copies of training program documentation sent to SOBI office

**2.3.4.17.9** Evolvment fee paid

**2.3.4.17.10** Submit for Practitioner Review Committee by Mar. 15, Jun. 15, Sept. 15, Dec. 15

**2.3.4.17.11** Practitioner Review Committee sends their recommendation to SOBI Office for Board of Directors approval

**2.3.4.17.12** Recommendations accepted and trainees are notified

Revision Date: 2011.06.16

## **Section 3: Instructor & Instructor Policy**

### **3.1 Membership**

#### **3.1.1 Instructor Membership**

**3.1.1.1** Instructor Continuing Education and Active membership consists of:

**3.1.1.1.1** One of the following, every two years:

**3.1.1.1.1.1** Sixteen Continuing Education Units of Ortho-Bionomy classes –or–

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

**3.1.1.1.1.3** Be observed teaching by a registered instructor –or–

**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 active status as an Instructor

Revision Date: 2024.03.18

### **3.1.2 Advanced Instructor Membership**

**3.1.2.1** Advanced Instructor Continuing Education and active membership consists of:

**3.1.2.1.1** One of the following:

**3.1.2.1.1.1** Sixteen units of Continuing Education every other year -or-

**3.1.2.1.1.2** Co-teaching with Registered Instructors -or-

**3.1.2.1.1.3** Be observed/Supervised teaching by Registered Instructor every two years -or-

**3.1.2.1.1.4** Attend the Ortho-Bionomy Conference and Instructor Retreat

**3.1.2.1.2** Annual payment of membership dues to maintain active status as an Advanced Instructor

Revision Date: 2012.10.02

### **3.1.3 Active and Inactive Instructors**

**3.1.3.1** Inactive Instructor membership option

**3.1.3.1.1** Instructor that is not teaching and has asked to move to a reduced level of SOBI membership. Their membership level would show at level they have chosen - such as Advanced Practitioner.

**3.1.3.1.2** Can belong to SOBI at a reduced level of membership

**3.1.3.1.3** Would only have the privileges attendant to that level

**3.1.3.2** Instructor to move back to Active Instructor member status

**3.1.3.2.1** Instructor can choose to resume active Instructor level membership

**3.1.3.2.2** In addition to payment of the appropriate rate of dues,

**3.1.3.2.3** S/he must submit documentation from a Registered Instructor of an appropriate CEU class i.e. Co-Teach, Supervised/Observed teaching

Revision Date: 2024.03.18

## **3.2 Training Level Requirements**

### **3.2.1 What level of Instructors and Experience Can Train Practitioners**

**3.2.1.1** **Advisor** – Associate Instructor – Advanced Instructor

Revision Date: 2011.06.16

**3.2.1.2** **Session Received** – Associate Instructor – Advanced Instructor can give session

**3.2.1.3** **Feedback Session** – Associate Instructor – Advanced Instructor

**3.2.1.4** **Evaluation Session** – Associate Instructor – Advanced Instructor

**3.2.1.5** **Study Group** – Associate Instructor – Advanced Instructor

**3.2.1.6** **Consultation** – Associate Instructor – Advanced Instructor

**3.2.1.7** **Supervised Demonstration** – Associate Instructor – Advanced Instructor  
[2024.03.18]

### **3.2.2 What level of Instructors and Experience Can Train Advanced Practitioners**

- 3.2.2.1 Advisor** – Associate Instructor – Advanced Instructor  
Revision Date: 2011.06.16
- 3.2.2.2 Session Received** – Associate Instructor – Advanced Instructor  
(Note: Practitioners and Advanced Practitioners may also give sessions)
- 3.2.2.3 Feedback Session** – Associate Instructor – Advanced Instructor
- 3.2.2.4 Evaluation Session** – Associate Instructor – Advanced Instructor
- 3.2.2.5 Study Group** – Associate Instructor – Advanced Instructor
- 3.2.2.6 Consultation** – Associate Instructor – Advanced Instructor
- 3.2.2.7 Supervised Demonstration** – Associate Instructor – Advanced Instructor  
[2024.03.18]

### **3.2.3 What level of Instructors and Experience Can Train Instructors**

- 3.2.3.1 Bench** – Instructor with 1-year active (3-5 classes per year) teaching experience can supervise a bench for an instructor trainee
- 3.2.3.2 Co-Teach** – Instructor with 2 years active (3-5 classes per year) teaching experience
- 3.2.3.3 Supervised Teach** – Instructor with 2 years active teaching experience
- 3.2.3.4 Advisor** – Instructor with 2 years active (3-5 classes per year) teaching
- 3.2.3.5 Instructor Training Seminar (ITS)** – One instructor that has previous experience teaching an ITS and one Advanced Instructor
  - 3.2.3.5.1** Trainers have minimum of 2 years teaching experience  
Revision Date: 2011.7.19 Inst. Train
  - 3.2.3.5.2** ITS Trainers submit a proposal for training to SOBI before running an ITS, so it can be approved as an ITS
  - 3.2.3.5.3** A Trainee cannot attend ITS1 or ITS2 until the class instructors have sighted (seen) the trainee's email of acceptance into the Instructor Trainee Program from the SOBI office  
Revision date: 2019.01.31

## **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
- 3.3.1.2** Utilize the SOBI Trademarks and abide by the Ortho-Bionomy Trademark Guidelines
- 3.3.1.3** Familiarize self with the Ortho-Bionomy Training Programs and handbooks.
- 3.3.1.4** Review the Training Programs annually and familiarize myself with changes
- 3.3.1.5** Advise trainees on Training Programs I am familiar with

- 3.3.1.6** Teach courses for which I have been trained to teach
- 3.3.1.7** Send in class lists to the Office to be input into the transcript database
- 3.3.1.8** Follow the SOBI Policies
- 3.3.1.9** Communicate with Board liaison or SOBI Office 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** Biannually complete and submit proof of Continuing Education
- 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** Notify Instructors of their and their trainees evolvments
- 3.3.2.8** Notify the Instructors of changes or updates of Training Program/handbook
- 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 Liaison/Contact on the SOBI Board
- 3.3.2.12** Not sell or market class or member information
- 3.3.2.13** Provide web-space for marketing Registered Ortho-Bionomy classes
- 3.3.2.14** Support Instructors, including study groups through SOBI Office and other expanded ways for Instructors to teach
- 3.3.2.15** Provide web-space for Instructors to promote themselves and their work
- 3.3.2.16** Continue to evolve SOBI technology and website to further support Instructors
- 3.3.2.17** Listen and respond to the requests of our Instructors
- 3.3.2.18** Actively facilitate the resolution of complaints and grievances

Revision Date: 2016.05.16

## **3.4 General Instructor Program Policies**

### **3.4.1 Instructor Advisor Guidelines and Responsibilities**

- 3.4.1.1** Advisor is an Instructor with 2 years active teaching
- 3.4.1.2** Is responsible to review and confirm Curriculum's requirements have been met at each level of application and training
- 3.4.1.3** Will review and confirm training program documentation is complete and in order for the Trainee at each level

- 3.4.1.4** Mentors and supports Trainee through their program, benching and co-teaching when possible
- 3.4.1.5** Recommends Trainee to apply for Instructor Training Program
- 3.4.1.6** Confirms Trainee co-teaches or benches with at least two Instructors
- 3.4.1.7** Recommends applicant to evolve to Associate Instructor
- 3.4.1.8** Confirms Supervised Teach is clearly identified as a Supervised Teach
- 3.4.1.9** Works with Associate Instructor to get in-person Supervised Teach
  - 3.4.1.9.1** If in-person Supervised Teach is not possible, will work with IRC and Associate Instructor to confirm if online Supervised Teach will be allowed

Revision Date: 2024.03.18

- 3.4.1.10** Recommends Associate Instructor trainee's evolvement to Instructor.
- 3.4.1.11** Will be the contact for the Instructor Review Committee or the Board, for applicant if there are questions.

### **3.4.2 Advanced Instructor Advisor Guidelines and Responsibilities**

- 3.4.2.1** Advisor is an Advanced Instructor
- 3.4.2.2** Responsible for review and understanding of the Advanced Instructor Training Program
- 3.4.2.3** Responsible to review and confirm Curriculum's requirements have been met at each level of application and training
- 3.4.2.4** Review and confirm paperwork is in order for Trainee at each level
- 3.4.2.5** Mentor and support Trainee through the Training Program, benching and co-teaching when possible
- 3.4.2.6** Recommends Trainee to apply for Advanced Instructor Training Program
- 3.4.2.7** Confirms Trainee co-teaches or benches with at least two instructors
- 3.4.2.8** Recommends applicant to evolve to Associate Advanced Instructor
- 3.4.2.9** Confirms Supervised Teach is clearly identified as a Supervised Teach
- 3.4.2.10** Work with Associate Advanced Instructor to get Supervised Teach
- 3.4.2.11** Recommends Associate Advanced Instructor evolvement to Advanced Instructor
- 3.4.2.12** Receives copy of Trainee's application and training documentations throughout the process
- 3.4.2.13** Will be contact for Instructor Review Committee or Board for applicant if there are questions.

### **3.4.3 Adding a Class**

- 3.4.3.1** **Instructors** - Adding Classes After Approved as an Instructor
  - 3.4.3.1.1** Associate Instructors may only teach Study Groups
  - 3.4.3.1.2** Instructors may add most basic classes after they:
    - 3.4.3.1.2.1** Co-teach
    - 3.4.3.1.2.2** Advisor/Supervising Instructor may require bench before co-teach.

**3.4.3.1.2.3** SOBI office receives notice of applicant's approval to teach from the Instructor who co-taught with the Trainee [09-08-27 Inst. Train]

Revision Date: 2022.03.23

**3.4.3.1.3** Instructors may add the following on basis of self-assessment:

**3.4.3.1.3.1** Anatomy and Physiology

**3.4.3.1.3.2** Demonstration Skills

**3.4.3.1.3.3** Elements of a Successful Practice

Revision Date: 2006.06.26, 2022.03.23

**3.4.3.2** Associate Advanced Instructor - Adding classes After Approved as an Associate Advanced Instructor:

**3.4.3.2.1** Chapman's Neurolymphatic Reflexes may be added

**3.4.3.2.2** Visceral may be added

**3.4.3.2.3** Process to add includes:

**3.4.3.2.3.1** Co-teach

**3.4.3.2.3.2** Advisor/Supervising Instructor may require bench before co-teach.

**3.4.3.2.3.3** SOBI office receives notice of applicant's approval to teach from the Instructor who co-taught with the Trainee.

Revision Date: 2022.03.23

**3.4.3.3** Advanced Instructor - Adding Classes After Approved as an Advanced Instructor:

**3.4.3.3.1** Ethics and Emotional Issues may be added

**3.4.3.3.2** Phase 7 may be added

**3.4.3.3.3** Cranial may be added

**3.4.3.3.4** Residential may be added

**3.4.3.3.5** Instructor Training Seminar (ITS) may be added

**3.4.3.3.6** Advanced Instructor Training Seminar (AITS) may be added

**3.4.3.3.7** Process to add the above classes includes:

**3.4.3.3.7.1** Co-teach

**3.4.3.3.7.2** Advisor/Supervising Instructor may require bench before co-teach.

**3.4.3.3.7.3** SOBI office receives notice of applicant's approval to teach from the Instructor who co-taught with the Trainee.

Revision Date: 2022.03.23

### **3.4.4 Instructor – Who Can Teach Each Class**

**3.4.4.1 Study Groups** — Associate Instructors and above may review material based on the classes that they have been approved to teach. Study groups may also be comprised of new information that the Instructor is exploring in their practice. Instructors and Associate Advanced Instructors may talk about the advanced work, but may not teach it and are expected to maintain integrity at the level for which they have been approved to teach.

**3.4.4.2 Ethics Study Group** — Associate Instructors through Advanced Instructors may conduct Ethics Tutorials and Study Groups

**3.4.4.2.1** Include discussion of SOBI Code of Ethics and Trademark Policies

**3.4.4.2.2** Include contemplation

**3.4.4.2.3** Meet the Ethics requirement for Associate members

**3.4.4.3 Postural Re-education and Post-Techniques** – Instructor bench, co-teach & be approved by the Co-teacher

**3.4.4.4 Isometrics** – Instructor bench, co-teach and be approved by the Co-teacher

**3.4.4.5 Exploration of Movement** – Instructor bench, co-teach and be approved by the Co-teacher

**3.4.4.6 Practitioner Training Seminar** – Instructor bench, co-teach and be approved by the Co-teacher

**3.4.4.7 Anatomy and Physiology** – basis of a self-assessment without benching

**3.4.4.8 Demonstration Skills** – basis of a self-assessment without benching

**3.4.4.9 Elements of a Successful Practice** – basis of a self-assessment without benching

**3.4.4.10 Instructor Training Seminar (ITS)** – bench, approval to co-teach by the Co-teacher

**3.4.4.10.1** Must have two years of experience

**3.4.4.10.2** Co-Teach – May not conduct an ITS without an Advanced Instructor, so this is a co-teach at Instructor level

Revision Date: 2011.07.19 Inst. Train

### **3.4.5 Associate Advanced and Advanced Instructor – Who can Teach Each Class**

**3.4.5.1** All classes listed in Section 3.4.4 for Instructors plus the following:

**3.4.5.2 Chapman’s Neuro-Lymphatic Reflexes** – Associate Advanced – bench, co-teach, advisor approval

**3.4.5.3 Visceral** – Associate Advanced – bench, co-teach, advisor approval

**3.4.5.4 Ethics and Emotions** – Advanced – bench, co-teach, advisor approval

**3.4.5.5 Phase 7** – Advanced – bench, co-teach, advisor approval

**3.4.5.6 Cranial** – Advanced – bench, co-teach, advisor approval

**3.4.5.7 Residential** – Advanced – bench, co-teach, co-teacher approval

**3.4.5.8 Instructor Training Seminar (ITS)** – bench, co-teach, co-teacher approval

**3.4.5.9** Co-Teacher may email or mail office letter of approval to teach

Revision Date: 2011.10.08 Adv. Inst. Train

## **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 Application to Instructor Training Program**

**3.5.1.1** Instructor Training Applicants are



- 3.5.1.1.1** Current members of SOBI in good standing
- 3.5.1.1.2** Registered Advanced Practitioner of Ortho-Bionomy -or-
- 3.5.1.1.3** Practitioner enrolled in Advanced Practitioner training with 375 hours completed of the Advanced Practitioner program.  
Revision Date: 2011.07.19 Inst. Train
- 3.5.1.1.4** Remain member in good standing of SOBI throughout their training  
Revision Date: 2020.04.09

### **3.5.2 Instructor Training Program Application includes:**

- 3.5.2.1** Instructor Program Application, is either a:
  - 3.5.2.1.1** Registered Advanced Practitioner -or-
  - 3.5.2.1.2** Practitioner with 375 units of Advanced Practitioner training completed and Practitioners must also include:
    - 3.5.2.1.2.1** Copy of Advanced Practitioner Program form
    - 3.5.2.1.2.2** Letter from Advanced Practitioner Advisor confirming completed 375 units
- 3.5.2.2** Typed answers to Essay questions
- 3.5.2.3** Advisor Selection form
- 3.5.2.4** Advisor Recommendation Form
- 3.5.2.5** Instructor Recommendation Form
- 3.5.2.6** Documentation submitted to SOBI office for 3/15, 6/15, 9/15, 12/15 for IRC
- 3.5.2.7** Reviewed by the Instructor Review Committee for approval by the SOBI Board
- 3.5.2.8** Application fee
- 3.5.2.9** Once approved, applicant may attend ITS  
Revision Date: 2011.07.19 Inst. Train

### **3.5.3 Instructor Training Application Approved before Instructor Training Seminar 1**

- 3.5.3.1** Instructor applicant must submit and be approved by the Instructor Review Committee & SOBI Board prior to attending the Instructor Training Seminar
- 3.5.3.2** Instructor Training Seminars are required for Instructor trainees  
Revision Date: 2011.07.19

### **3.5.4 Instructor Trainee – Bench Assist**

- 3.5.4.1** Practitioner with 375 Advanced Practitioner training units completed – can do one Bench Assist for Instructor Trainee who has not evolved to Advanced Practitioner, before 1<sup>st</sup> Instructor Training Seminar (ITS).
- 3.5.4.2** Advanced Practitioner Trainees – prior to the first ITS may Bench Assist more than one class for credit.
- 3.5.4.3** Trainee must Co-Teach and Bench Assist with at least two Instructors.
- 3.5.4.4** Complete 6-12 Bench Assists as per training program agreement

- 3.5.4.5 Classes are at least 16 units
  - 3.5.4.6 Class days do not need to be consecutive
  - 3.5.4.7 All Bench Assists must be in Phase 4 classes (see Definitions)
  - 3.5.4.8 At least 5 Bench Assists must be in Standard Phase 4 classes (for a complete list see Definitions)
  - 3.5.4.9 At least three Bench Assists must include demonstrations/presentations
  - 3.5.4.10 Bench Assists before ITS Part I may not include classroom demonstrations/presentations.
  - 3.5.4.11 A minimum of five Bench Assists must be completed after completing ITS Part I
- Revision Date: 2024.04.18

### **3.5.5 Instructor Training Seminar (ITS) is required for Instructor Trainees**

- 3.5.5.1 2 segments (ITS I and ITS II) separated by a gap of at least 6 months.
- 3.5.5.2 The first segment is a prerequisite for ITS II.
- 3.5.5.3 The second segment may be taken after completing Bench Assists with presentations, of which one counts for credit.
- 3.5.5.4 ITS includes minimum of 1 Advanced Instructor Trainer  
Revision Date: 2011.07.19
- 3.5.5.5 ITS structured and consistent length so BITS I and BITS 2 can be with same or different set of trainers and still cover all required topics  
Revision Date: 2005.09.08
- 3.5.5.6 ITS should include elements of Phase V & VI  
Revision Date: 2005.09.08

### **3.5.6 Instructor Trainees must be approved as an Associate Instructor before they co- teach.**

- 3.5.6.1 Instructor trainees submit evolvement request to SOBI Office
- 3.5.6.2 Associate Instructor is recommended by the Instructor Review Committee and approved by the Board of Directors
- 3.5.6.3 Instructor Review Committee meeting deadlines are 4 times a year – 3/15, 6/15, 9/15, 12/15  
Revision Date: 2011.07.19

### **3.5.7 Associate Instructor Evolvement (completion of ITS 1 and 6-12 benches):**

- 3.5.7.1 Has been approved as an Advanced Practitioner
- 3.5.7.2 Has completed ITS I
- 3.5.7.3 Instructor Training Program Agreement Part 1
- 3.5.7.4 Associate Instructor Evolvement Request Form
- 3.5.7.5 One evolvement recommendation form from advisor who has experienced the trainee's work in the classroom including demonstrations/presentations

- 3.5.7.6** One involvement recommendation form from an instructor who has experienced the trainee's work in the classroom including demonstrations/presentations
- 3.5.7.7** 6-12 Bench-assist forms (3 with demos) from applicant and Instructor
- 3.5.7.8** Submit to SOBI Office by 3/15, 6/15, 9/15, 12/15 for IRC
- 3.5.7.9** IRC reviews and makes recommendations to SOBI Board for approval
- 3.5.7.10** Trainees may not co-teach until approved by Board as an Associate Instructor.

Revision Date: 2024.04.18

### **3.5.8 Associate Instructor Co-Teaching Guidelines**

- 3.5.8.1** Instructor Trainee teaches 50% of the class.
- 3.5.8.2** The Trainee must have completed
  - 3.5.8.2.1** All Bench-Assists,
  - 3.5.8.2.2** Part One of the ITS, and
  - 3.5.8.2.3** Be appointed an Associate Instructor before co-teaching
- 3.5.8.3** Complete 3-6 Co-Teaches as per training program agreement
- 3.5.8.4** Classes are at least 16 units
- 3.5.8.5** Class days do not need to be consecutive
- 3.5.8.6** All Co-Teaches must be in Phase 4 classes (see Definitions)
- 3.5.8.7** At least 3 Co-Teaches must be in Standard Phase 4 classes (for a complete list see Definitions)
- 3.5.8.8** Two trainees may not Co-Teach during the same class
- 3.5.8.9** An Instructor Trainee must bench-assist the class before co-teaching the class.
- 3.5.8.10** Co-teach and bench with at least two Instructors
- 3.5.8.11** One co-teach may be online

Revision Date: 2011.07.19

Revision Date: 2024.04.18

### **3.5.9 Instructor Supervised Teach**

- 3.5.9.1** Trainee must have completed all required Co-Teaches
- 3.5.9.2** Complete 1-2 Supervised Teaches as per training program agreement
- 3.5.9.3** Must be a Standard Phase 4 class of at least 16 units (for a complete list see Definitions)
- 3.5.9.4** Confirm publicity for Supervised Teach is clearly identified as Supervised Teach
- 3.5.9.5** Supervising Instructor has 2 years of active teaching experience
- 3.5.9.6** Supervising Instructor should be in attendance at the class
- 3.5.9.7** Online Supervised Teaches may be allowed as exceptions
  - 3.5.9.7.1** Trainee and students must be in person, Supervising Instructor must be live online
  - 3.5.9.7.2** Circumstances must exist that necessitate an online Supervised Teach

**3.5.9.7.3** Must be approved by the IRC and the trainee's advisor

Revision Date: 2024.03.18

### **3.5.10 Request for Instructor Evolvment Includes:**

- 3.5.10.1** Completed all forms and requirements
- 3.5.10.2** Complete ITS I and II Program Agreement
- 3.5.10.3** Completed Instructor Program Record Form (page 17-22), including Advanced Instructor Signature or e-signature
- 3.5.10.4** Evolvment request form/Applicant letter requesting evolvment
- 3.5.10.5** One evolvment recommendation form from advisor who has experienced the trainee's work in the classroom including demonstrations/presentations
- 3.5.10.6** One evolvment recommendation form from an instructor who has experienced the trainee's work in the classroom including demonstrations/presentations
- 3.5.10.7** Completed Bench-assists – matching # from applicant's ITSform
- 3.5.10.8** Completed Co-teach forms from Applicant
- 3.5.10.9** Completed Co-teach forms from Instructors they co-taught with
- 3.5.10.10** Supervised Teach form from Applicant
- 3.5.10.11** Supervised Teach form from Instructor
- 3.5.10.12** Sent to SOBI Office 3/15, 6/15, 9/15, 12/15 to be submitted to IRC
- 3.5.10.13** IRC sends recommendations to office for Board approval
- 3.5.10.14** Applicants must have their evolvment approved before teaching a class as an Instructor
- 3.5.10.15** Applicants may continue to do Study Groups (which they are approved to teach as an Associate Instructor) until they are approved
- 3.5.10.16** The IRC will contact the Advisor if there are questions regarding the documentation

Revision Date: 2024.04.18

## **3.6 Advanced Instructor Training Program**

### **3.6.1 Transition to Current Advanced Instructor Training Program**

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

- 3.6.1.1** Trainee does not need to complete application if they are already enrolled in Advanced Instructor Training
- 3.6.1.2** Trainee's current title stays the same until the Trainee evolves per the program
- 3.6.1.3** All training prior to October 8, 2011 applies to the requirements of this program
  - 3.6.1.3.1** Letters from Trainee's Advisors documenting what requirements have been fulfilled will substitute for bench forms
  - 3.6.1.3.2** These classes do need to be listed on the Program Record form
- 3.6.1.4** All training done after October 8, 2011 will need to be documented using the current Advanced Instructor Training Program forms

**3.6.2 Advanced Instructor Training Program Prerequisites:**

- 3.6.2.1** Current Instructor member of SOBI in good standing
- 3.6.2.2** Minimum 2 years of teaching experience with demonstrated competence
- 3.6.2.3** Minimum 12 Ortho-Bionomy classes taught, including
  - 3.6.2.3.1** Phase IV
  - 3.6.2.3.2** Exploration of Movement Patterns
  - 3.6.2.3.3** Postural Re-education and Post-Techniques
  - 3.6.2.3.4** Isometrics and Isotonics
- 3.6.2.4** Two Advanced Instructors recommendations

Revision Date: 2011.10.08

**3.6.3 Advanced Instructor Training Program Application includes:**

- 3.6.3.1** All prerequisites have been met
- 3.6.3.2** Advanced Instructor Program application and questions typed
- 3.6.3.3** Two Instructor/Advisor recommendation forms to enter Advanced Instructor Training from Advanced Instructors who agree to serve as applicant's Advisors and support applicant's training
- 3.6.3.4** Documentation submitted to SOBI office for 3/15, 6/15, 9/15, 12/15 for IRC
- 3.6.3.5** IRC sends recommendation to SOBI Board, Board approves application

**3.6.4 Associate Advanced Instructor Training**

- 3.6.4.1 Phase V Curriculum** includes minimum of:
  - 3.6.4.1.1** 2 bench-assists with Advanced Instructors
  - 3.6.4.1.2** 2 co-teaches with Advanced Instructors
    - 3.6.4.1.2.1** NOTE: A co-teach cannot be shared with other trainees
    - 3.6.4.1.2.2** 1 Co-teach with Trainee's Advisor
  - 3.6.4.1.3** 1 Supervised Teach supervised by Trainee's other Advanced Instructor Advisor
  - 3.6.4.1.4** All coursework is based on 16 units of class
  - 3.6.4.1.5** Trainee's Advisors may require more than stated minimums
  - 3.6.4.1.6** Residentials count as one class/experience
  - 3.6.4.1.7** Some of these requirements completed with trainee's Advisors
  - 3.6.4.1.8** Timeline of Phase 5 & 6 training may overlap
    - 3.6.4.1.8.1** Phase 6 classes come up between Phase 5 co-teach or Supervised Teaches
    - 3.6.4.1.8.2** After a minimum of 2 Phase 5 bench assists, trainee may begin Bench Assisting Phase 6 classes for credit

**3.6.4.1.8.3** Once trainee has completed and sent in their Phase 5, Associate Advanced Instructor paperwork, with Advisor permission, they can begin their Phase 6 co- teaches.

**3.6.4.2 Supervised Teach** – Trainee is responsible for every aspect of the class

**3.6.4.2.1** Supervising Instructor is in Observer role

**3.6.4.2.2** Supervising Instructor is one of the trainee's Advisors

**3.6.4.2.3** Supervising Instructor will evaluate Trainee's performance for recommendation to evolve or complete an additional Supervised Teach

Revision Date: 2011.10.08

**3.6.4.3 Associate Advanced Instructor Evolvement** (completion of Phase V training):

**3.6.4.3.1** Program Record form, Page 1

**3.6.4.3.2** Program Agreement form – Phase 5

**3.6.4.3.3** All Trainee Class Self-Evaluation forms – bench, co-teach, Supervised Teach

**3.6.4.3.4** All Trainee Instructor Class Self-Evaluation forms – bench, co-teach, Supervised Teach

**3.6.4.3.5** 2 Evolvement to Associate Advanced Instructor request forms from Advisors

**3.6.4.3.6** Evolvement request from trainee

**3.6.4.3.7** 2 Recommendation forms from Instructor from Advising Instructors

**3.6.4.3.8** Sent to SOBI Office 3/15, 6/15, 9/15, 12/15 to be submitted to IRC

**3.6.4.3.9** IRC sends recommendations to Office for Board approval

**3.6.4.3.10** Once board approves, trainee has evolved to Assoc. Adv. Instructor

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

**3.6.4.3.12** Trainees must have their evolvement approved before completing their Supervised Teach for Advanced/Phase 6

**3.6.4.3.13** The IRC will contact the Advisor if there are questions with the documentation

Revision Date: 2011.10.08

### **3.6.5 Advanced Instructor Training**

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

**3.6.5.1.1** 2 bench assists with Advanced Instructors

**3.6.5.1.2** 2 co-teaches with Advanced Instructors

**3.6.5.1.2.1** NOTE Co-teaches cannot be shared by other Trainees

**3.6.5.1.2.2** 1 Supervised Teach supervised by Advanced Instructor

Revision Date: 2011.10.08 Adv Inst. Train

**3.6.5.1.2.3** All coursework is based on 16 units of class

**3.6.5.1.3** Trainee's Advisor may require more than stated minimums

- 3.6.5.1.4 Residentials count as one class/experience
- 3.6.5.1.5 Timeline of Phase 5 & 6 training may overlap
  - 3.6.5.1.5.1 Phase 6 classes come up between Phase 5 co-teach or Supervised Teaches
  - 3.6.5.1.5.2 After a minimum of 2 Phase 5 bench assists, trainee may begin Bench Assisting Phase 6 classes for credit
  - 3.6.5.1.5.3 Once trainee has completed and sent in their Phase 5, Associate Advanced Instructor paperwork, with Advisor permission, they can begin their Phase 6 co-teaches.
- 3.6.5.2 **Supervised Teach** – Trainee is responsible for every aspect of the class
  - 3.6.5.2.1 Supervising Instructor is in Observation role
  - 3.6.5.2.2 Supervising Instructor will evaluate the Trainee's performance, recommendation to evolve or complete an additional Supervised Teach
 Revision Date: 2011.10.08
- 3.6.5.3 **Advanced Instructor Evolvment** (completion of Phase VI training):
  - 3.6.5.3.1 Program Record form, Pages 1 and 2
  - 3.6.5.3.2 Program Agreement form – Phase 5 and 6
  - 3.6.5.3.3 All trainee Class Self-Evaluation forms – bench, co-teach, Supervised Phase 5 & 6
  - 3.6.5.3.4 All trainee instructor Class Self-Evaluation forms – bench, co-teach, Supervised Teaches for Phases 5 and 6
  - 3.6.5.3.5 2 Evolvment to Advanced Instructor request forms from Advisors
  - 3.6.5.3.6 1 Evolvment form from the trainee
  - 3.6.5.3.7 2 Recommendation forms from Advising Instructors
  - 3.6.5.3.8 Sent to SOBI Office 3/15, 6/15, 9/15, 12/15 to be submitted to IRC
  - 3.6.5.3.9 IRC sends recommendations to office for Board approval
  - 3.6.5.3.10 Trainees must have their evolvment approved before teaching as an Advanced Instructor
  - 3.6.5.3.11 The IRC will contact the Advisor if there are questions with the documentation
 Revision Date: 2011.10.08

### 3.7 International Instructors & Training

See General Policy (Section 1.3 International Policy) for policy on reciprocity in International membership and training

### 3.8 Curriculum Review Committee (CRC)

#### 3.8.1 General CRC Policy

- 3.8.1.1 Helps evolve the training program curriculum and education policies
- 3.8.1.2 Submit all curriculum proposals to the Board of Directors for approval

Revision Date: 2001.10.28

- 3.8.1.3** Three or five members appointed by the Board of Directors of the Society of Ortho-Bionomy International

Revision Date: 2020.11.09

- 3.8.1.4** Minimum 2 Instructors, including 1 Advanced Instructor and can include 1 Advanced Practitioner

Revision Date: 2015.09.10

- 3.8.1.5** Three-year Curriculum Committee term

Revision Date: 2001.10.28

- 3.8.1.6** Curriculum Policy recommendations are sent to the Instructor community for input by the Board

Revision Date: 2001.10.28

- 3.8.1.7** Curriculum Policy voted on by Instructor body

Revision Date: 1984.06.25

- 3.8.1.8** Board of Directors has the final approval in the Curriculum Policy approval process

Revision Date: 2001.10.28

### **3.8.2 Electives**

- 3.8.2.1** Electives Development:

- 3.8.2.1.1** Electives that count for SOBI training programs will be approved by the Curriculum Review Committee.

- 3.8.2.1.2** Instructor submission/form includes:

- 3.8.2.1.2.1** A class title

- 3.8.2.1.2.2** The hours/units of the class

- 3.8.2.1.2.3** A class outline in brief point form

- 3.8.2.1.2.4** A short description of the content

- 3.8.2.1.2.5** Cover letter explaining its relevance to Ortho-Bionomy and why it should be considered for approval.

Revision Date: 2006.06.26

- 3.8.2.2** Elective Review – Elective courses can be reviewed:

- 3.8.2.2.1** SOBI Board may determine the means for a current elective to be reviewed

- 3.8.2.2.2** Course participant may request a review to the SOBI Board

- 3.8.2.2.3** SOBI Board may request CRC to review the elective

Revision Date: 2006.07.25

### **3.8.3 Curriculum Review – Specific Classes:**

- 3.8.3.1** **Anatomy & Physiology** – course can be completed as a home study with an Ortho-Bionomy instructor

Revision Date: 1990.06.01



- 3.8.3.2 No Internal Work** – No credit or endorsement will be given by the Society for any Ortho-Bionomy class, required for elective, in which internal work is done. (This was passed on advice of our attorney)

Revision Date: 1992.04.24

### **3.9 Instructor Review Committee (IRC)**

#### **3.9.1 General IRC Policy**

- 3.9.1.1** Instructor Review Committee submissions due March 15, June 15, September 15, December 15
  - 3.9.1.2** Verify the completeness of trainee's documentation and complete a qualitative examination of documentation
  - 3.9.1.3** Reviews Applications and Evolvments for all levels of Instructor and Advanced Instructor Trainee's Evolvment submissions
  - 3.9.1.4** Instructor Review Committee sends their recommendation to SOBI Office for Board of Directors
  - 3.9.1.5** Recommendations, acceptances and the trainees are notified
  - 3.9.1.6** Committee has 4 members, 3 active and 1 alternate
  - 3.9.1.7** Serve for 4 years beginning in September
  - 3.9.1.8** One new committee member each year
  - 3.9.1.9** Board of Directors appoints Committee members
  - 3.9.1.10** Committee members may be:
    - 3.9.1.10.1** Advanced Instructors (at least 1 on committee)
    - 3.9.1.10.2** Instructors with 3 years of experience
  - 3.9.1.11** If the Trainee's program documentation is incomplete, the committee will alert the applicant's Advisor of missing material and mark the trainee's documentation submission pending, waiting on receipt of the missing material
- Revision Date: 2006.03.10

## **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**

Revision Date: 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 member of the Society of Ortho-Bionomy International, such as in their biography
- 4.2.1.1.2** Not use the trademarks, symbol or word Ortho-Bionomy outside of stating they are a member

Revision Date: 1998.09.15

**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

Revision Date: 1998.09.15

**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

Revision Date: 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

Revision Date: 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 4 statement options below:

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

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

**4.2.3.1.2.4** 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 on Business Cards**

**4.2.3.2.1** Associates through to Instructors may use the word Ortho-Bionomy® on business cards.

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

Revision Date: 1998.09.15

**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 Tapes for sale

**4.2.3.3.3** Merchandise for sale

**4.2.3.3.4** Other uses not listed above

Revision Date: 1998.09.15

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

Revision Date: 1998.09.15

### **4.3 Trademark Violation**

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

Revision Date: 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

Revision Date: 2006.06.26

## **Section 5:Online Class Policy**

Established 2021.2.26

### **5.1 Instructor & Class Requirements**

- 5.1.1** 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** All Online classes require real-time instructor interaction and are to be documented as "Online" on certificates and on the program record form.
- 5.1.1.2** 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]
- 5.1.1.3** 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: 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: 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: Cranial, Residential, feedback sessions, and evaluation sessions must be in person.
- 5.2.4** Group 4: 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.

Revision Date 2021.7.9

## **5.3 Student Member Programs:**

### **5.3.1 Students in the Associate Member Program**

- 5.3.1.1** One online class from Group 1 can be used as an elective.
- 5.3.1.2** Ethics may be taken online to fulfill the program requirement.

### **5.3.2 Students in the 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** Online classes that exceed the PTP requirements, listed as “Additional Classes” on the record form, may be rolled over into the Advanced program as electives with advisor approval.

### **5.3.3 Students in the 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** Fifteen documented sessions may be live online sessions. This is 10% of the 150-unit documented sessions requirement.

### **5.3.4 Study Groups**

- 5.3.4.1** A maximum of 3 online Study Groups (9 units) will be accepted for credit in the PTP.
- 5.3.4.2** A maximum of 6 online Study Groups (18 units) will be accepted for credit in the APTP.
- 5.3.4.3** More online Study Groups may be taken and credited as consultations with advisor approval.

### **5.3.5 ITS and AITS Trainees**

- 5.3.5.1** A maximum of two online bench assists and one online co-teach are allowed.
- 5.3.5.2** Exceptions could be made to include more bench assists with Advisor’s approval.
- 5.3.5.3** One online ITS is allowed, either Part I or Part II.

Revision Date: 2024.03.18

## **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)
- 6.2.1.2 **Phase 4 Classes:** Standard Phase 4, Postural Re-Education & Post Techniques, Isometrics & Isotonics, Exploration of Movement, Self-Care, In-Depth Phase 4, and Non-Standard Phase 4
- 6.2.1.3 **Standard Phase 4:** Phase 4 Techniques for the major structures of the body that every Instructor is responsible to know. Standard classes are Phase 4 Spine, Phase 4 Extremities, and Phase 4 Whole Body. Titles of Standard Phase 4 classes may differ and content may have some minor variation, but should be essentially the same in any Registered Ortho-Bionomy Instructor classroom. Standard Phase 4 classes may include Cervical, Thoracic, and Lumbar Spine; Ribs; Psoas; Ilium; Sacrum; Femur; Knee; Ankle; Foot; Shoulder; Elbow; Wrist; Hand.
- 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.
- 6.2.1.5 **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.

### 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.

### 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.
- 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.
- 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 is

responsible for 50% of all aspects of teaching the class. If a trainee/Instructor teaches less than 50% of the class this would count as a Bench Assist instead of a Co-Teach.

**6.2.3.4 Collaborative/Team Teach:** Two Instructors, neither of whom are in training, who are teaching together. The use of the term co-teach does not apply.

**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.

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

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.

[2024.04.18]

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

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

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

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

## **6.3 Date Format**

The date of the policy format yyyy.mm.dd

## **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.