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 evolvements

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

1.2.4 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.

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).

1.3.3 Non-SOBI International Instructors teaching in the United States.

1.3.3.1 Must be sponsored by a registered SOBI Instructor.

1.3.3.2 Must be members in good standing of their accrediting organization.

1.3.3.3 May teach core curriculum

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.

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.

Addendum

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

Definitions

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

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

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

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

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

Date Format

The date of the policy format yyyy.mm.dd

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.