

Policy Section 1: Organizational, Board & International Policy for the Society of Ortho-Bionomy International[□]

Includes Organizational Policy, Bylaws, Board of Directors, Code of Ethics, Grievance, And International Policy

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Abbreviations Key and Definition:

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

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 [yy-mm-dd]

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

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

Board of Directors Policy:

- **Board of Directors - members, Candidates** – Associate and Above Level Members and Non-members with Professional Skills [06-03-20 Bylaws]
- **Board of Directors – Number** 7 board members on Board [96-04-01 Bylaws]
- **Board of Directors – Term** 3 year term continues until successor is elected or qualified [96-04-01 Bylaws]
- **Board of Directors – Member level** 3 of the Board members must be Instructor level members [96-04-01 Bylaws]
- **Board of Directors – Oversee the Society** of Ortho-Bionomy International (SOBI), subject to the limitations of the following documents:
 - Articles of Incorporation – SOBI is a mutual benefit corporation in the State of California whose purpose is to promote and encourage the study and practice of Ortho-Bionomy.
 - Bylaws
 - California 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. [11-01-01 Bylaws]
- **Board of Directors - Compensation/Reimbursement** for expenses determined by Board of Directors. [11-01-01 Bylaws]
- **Board of Directors – Officers** are:
 - President
 - Vice President
 - Secretary (Secretary & President can not be same person)
 - Treasurer [11-01-01 Bylaws]
- **Board of Directors – Secretary and Treasurer** do not need to be members of the Board [11-01-01 Bylaws]
- **Board of Directors – President** is the:
 - Chief Executive Officer
 - General Manager
 - General supervision, direction, control of business and affairs of corporation, subject to the control of the Board [11-01-01 Bylaws]

- **Board of Directors – Vice President** shall act as President in the absence or disability of the President. [11-01-01 Bylaws]
- **Board of Directors – Secretary** shall keep:
 - A book of meeting minutes for members and the Board
 - Copy of the corporation’s Articles and Bylaws, as amended to date [17-10-03]
- **Board of Directors – Treasurer** is the:
 - Chief Financial Officer of the corporation
 - Maintains adequate and correct accounts of the properties and business transactions of the corporation
 - Receives and disburses all money, upon authorization by the Board [11-01-01]
- **Board of Directors – Annual Report** is created and members are notified within 120 days of fiscal year end (section 8321 of the California Corporations Code)[11-01-01]
- **Board of Directors - Bylaws** – Bylaws may be amended by:
 - Majority vote of members present at a meeting of members, if meets quorum
 - Majority vote of authorized number of Board of Directors[11-01-01 Bylaws]
- **Board of Directors – Bylaws – Board Vote** - may vote to change
 - May vote on change to Bylaws if majority of Board of Directors vote
 - Exception is changing the number of Directors[11-01-01 Bylaws]
- **Board of Directors – Number of Board of Directors Change** - can only be changed by a majority vote of members [11-01-01 Bylaws]
- **Board of Directors - 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).) [11-01-01 Bylaws]
- **Board of Directors – Indemnification** – Corporation can indemnify person that was agent of corporation [11-01-01 Bylaws]

- **Board of Directors - Removal of a Board Director (Section 12) -**
 - The director has a continuing conflict of interest that cannot be reconciled or is failing in his/her fiduciary responsibilities.
 - The board member has crossed ethical borders, with potential lawsuits for sexual harassment, bullying or fraudulent activities.
 - The director is ineffective, not able to do the job, not participating appropriately in Board discussions or committee assignments.
 - The director is not interacting well with others.
 - The director acts independently of the Board in the name of the organization.
 - The director has unexcused absences from two Board meetings.

- **Board of Directors - Instructor Agreement - Signed agreement between Board of Directors & Instructors**
 - **Instructors sign and agree to:**
 - Abide by the Society of Ortho-Bionomy International (SOBI) Code of Ethics
 - Utilize the SOBI Trademarks and abide by the Ortho-Bionomy Trademark Guidelines
 - Familiarize self with the Ortho-Bionomy Training Programs and handbooks.
 - Review the Training Programs annually and familiarize myself with changes
 - Advise trainees on Training Programs I am familiar with
 - Teach courses for which I have been trained to teach
 - Send in class lists to the Office to be input into the transcript database
 - Follow the SOBI Policies
 - Communicate with Board liaison or SOBI Office if I have questions
 - Include Trademark Policy and SOBI information in my classes
 - Renew my membership annually
 - Biannually complete and submit proof of Continuing Education
 - Participate and abide by request in mediation or grievance process
 - **Board signs and agrees to:**
 - Abide by the Society of Ortho-Bionomy International Code of Ethics
 - Use the Principles, Mission and Vision as Guidelines for the Society to function
 - Conduct ourselves in a professional manner
 - Support and oversee Training Programs
 - Support and oversee Trademarks
 - Develop and provide transcripts for students/trainees
 - Notify Instructors of their and their trainees evolvments
 - Notify the Instructors of changes or updates of Training Program/handbook
 - Maintain class list information and keep the material confidential
 - Provide materials to Instructors to promote SOBI membership

- Provide Instructors with a Liaison/Contact on the SOBI Board
 - Not sell or market class or member information
 - Provide web-space for marketing Registered Ortho-Bionomy classes
 - Support Instructors, including study groups through SOBI Office and other expanded ways for Instructors to teach
 - Provide web-space for Instructors to promote themselves and their work
 - Continue to evolve SOBI technology and website to further support Instructors
 - Listen and respond to the requests of our Instructors
 - Actively facilitate the resolution of complaints and grievances [16-05-16]
- **Code of Ethics - Members** - follow the Code of Ethics:
 - Uphold highest standard of professional behavior
 - Guided by principles of Ortho-Bionomy philosophy and concepts
 - Render highest quality of services for well-being and benefit of the client
 - Offer skills or services they have specifically been trained in
 - Protect privacy of their clients
 - Maintain regard for common legal, moral and ethical standards
 - Make clear distinction between Ortho-Bionomy and other modalities used
 - Bring notice to SOBI of ethically inappropriate or out-of-the-standards action another member takes
 - Use Society Trademarks in occurrence with Trademark Guidelines
 - Continue to complete Continuing Education training
 - Uphold professional relationships and not slander a member of the Ortho-Bionomy or allied professional community
 - People in their employment will abide by the Society Policies and Trademark
 - Display Code of Ethics in their work area
 - Understand transgression in Code of Ethics may result in surrender of their membership [87-10-01 Code of Ethics]
 - **Meetings - Annual meeting** of members are scheduled by Board of Directors [11-01-01 Bylaws]
 - **Meetings – Special meetings** may be called by the Board of Directors, the President, or over 5% of the membership body [11-01-01 Bylaws]
 - **Membership Dues** - Membership Dues are established by the Board of Directors

- **Membership Termination -**
 - resignation by member
 - failure to pay dues by due date
 - expulsion by Board of Directors for prejudicial conduct to the interests of corporation after hearing has been conducted [11-01-01 Bylaws]
- **Voting –** Board of Directors are elected by Associate Members – Advanced Instructors provide and maintain Training Program handbooks
- **Voting –** Voting is completed by ballot [11-08-28 Bylaws]
- **Voting –** Meeting notice 10-90 days from meeting [11-01-01 Bylaws]
- **Voting –** Quorum – 10% of voting members is a quorum [11-01-01 Bylaws]
- **Voting –** 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 [11-01-01 Bylaws]
- **Voting – Format for Voting Protocol**
 - 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
 - Registered Instructors vote on Changes in curriculum, status of Instructors, changes in Instructor Training (except pertinent to all voting members)
 - Board of Directors vote on changes in policy or organizational function [84-06-25]

Grievance and Complaint Policy:

- **Grievance -** SOBI has a formal Grievance Policy
 - Includes options for conflict resolution, complaint/informal grievance, mediation and formal grievance
 - Grievance can be filed by members and non-members
 - Grievance Policy and Procedure are available to members and the public
 - Grievance may be filed for:
 - administrative actions
 - Trademark violations
 - member misconduct
 - violations of SOBI Code of Ethics
 - violations of Professional Standards [93-06-01 Bylaws]

- Disciplinary Action may be taken by the Board of Directors
 - Board of Directors may take disciplinary action
 - Disciplinary action may include Termination of membership, including termination of use of the Trademark [15-05-10 Grievance]

International Policy

- **International – International members** can pay discounted rate of 65% US dollar of their membership fees, if their currency is 10% less than US Dollar as of January 1st of that year. [03-10-10]
- **International – Australian Reciprocity** -SOBI & Ortho-Bionomy Australia (OBA)
 - OBA has reciprocity for members in the Affiliate, Practitioner & Advanced Practitioner training with SOBI
 - OBA members need to become dual members of SOBI and OBA when they apply for SOBI Instructor Training
 - Show proof of training & certificates of program completion
 - OBA Instructors - Instructor Trainees through Advanced Instructors maintain dual membership of both OBA and SOBI
 - SOBI has put into place a discounted membership policy for members of any other recognized Ortho-Bionomy organization
 - Established a practice of regular contact between our organizations [17-11-14]
- **International – Canadian Reciprocity** with Ortho-Bionomy Association of Canada
 - No limit on non-SOBI credits in Training Programs
 - Reciprocity reaffirmed between SOBI and OBAC by SOBI Board [17-11-14]
 - SOBI instructors are aware that they must coordinate with OBAC to teach in Canada
 - SOBI has put into place a discounted membership policy for members of any other Ortho-Bionomy organization
 - Established practice of regular contact between organization liaisons[10-09-02]
- **International – Training Reciprocity** - Ortho-Bionomy program trainees
 - Can take up to 64 units in Practitioner and Advanced Practitioner training programs with non-SOBI instructors who are registered with other Ortho-Bionomy associations that have reciprocity with SOBI
 - Practitioner trainees must take a minimum of 2 Phase 4 classes with registered SOBI Instructors[03-10-09]
- **International – Visiting Instructor** - Visiting Instructors must:
 - Have a Registered SOBI Instructor as a sponsor

- Must be current members of the Ortho-Bionomy European Association of Instructors (OBEAT) or another sister organization recognized by the SOBI Board of Directors, and has reciprocity in place
- Request and be granted a license to use the Society's Trademark by the Society and Board President[99-04-15]