

# Special Interest Group Standard Operating Procedures

## 1. Special Interest Groups Structure and Responsibilities

- a. Responsibilities of President:
  - i. SIG leadership supports the development and implementation of the strategic framework of AOPT
  - ii. Attends AOPT Business Meeting and Board of Directors meeting at CSM annually.
  - iii. Will staff the AOPT Booth at CSM for a minimum of two hours each year or will assure commensurate SIG representation thereto.
  - iv. Communicates regularly with their AOPT Director regarding SIG activities.
  - v. Contributes to *OPTP* to inform SIG and AOPT members of SIG activities following the schedule provided.
- b. Responsibilities of Vice-President/Education Chair:
  - i. Serves as Chair of the standing Education Committee for its functions to SIG members and any external parties.
  - ii. Solicit educational program submission(s) each year for CSM
  - iii. Inform the AOPT's Education chair of SIG-sponsored submission
  - iv. Serve as moderator for the applicable SIG's educational program at CSM each year.
- c. Responsibilities of Nominating Committee Members (Chair and two committee members):
  - i. Annually seek and solicit among SIG members potential candidates for elected officials.
- d. Responsibilities of the Sub-Committee or Task Force (Chair and two committee members):
  - i. The SIG Governing Board will establish time limits for the sub-committee or task force, and
  - ii. In the annual report to the AOPT Board of Directors, the SIG President will:
    1. List the names of the members of the sub-committee or task force.
    2. Provide a detailed report of the activities/findings of the sub-committee or task force.
- e. Appointments:
  - i. The names of Standing Committee members will be put forth by the Nominating Committee Chair and the membership at the CSM SIG Business Meeting, for appointment by the SIG Governing Board.

## 2. Meetings

- a. Provide a proposal of two hours of educational programming each year at CSM.
  - i. Communicate with AOPT Education Committee Chair on their submission.
  - ii. A SIG-sponsored pre-conference course can substitute for a submitted educational session. Additionally, a SIG can sponsor both a pre-conference and educational session in the same year.
  - iii. A SIG may submit a program to another Academy or Section other than the AOPT.
  - iv. The selection of the educational program proposal submitted by the SIG each year will be based on the merit of the proposal as determined by the AOPT

Education Committee (Refer to Education Policy, I. Combined Section Meeting, A. Programming 1. for additional information), and does not guarantee acceptance.

- v. Hold at least two SIG leadership meetings (via conference call or virtual) per year to conduct SIG business.
  - 1. The AOPT office will arrange all SIG meetings, even if the SIG desires to have more than the required two calls during the calendar year.
  - 2. Additional meetings can be scheduled for business or education as long as there is no conflict with AOPT or APTA functions. AOPT will not subsidize these additional meetings.
  - 3. The SIG's CSM Membership Meeting can take place in person at CSM or virtually before or after. The meeting will be recorded if virtual and posted to the SIG webpage on the AOPT's website.

### **3. Budget and Financial Impact**

- a. The SIG President and Vice President/Education Chair will be reimbursed for airfare, three days per diem (meals & hotel), and conference registration for attendance at CSM.
- b. The SIG will provide an annual budget of \$3,750 each calendar year. Any portion of this \$3,750 that is not used in a given year does not roll over into the next year. After a SIG has spent the \$3,750 allocated for a given year, all other expenses incurred will be taken out of the SIGs encumbered funds. If no encumbered funds exist, special approval of the AOPT Board of Directors is needed prior to receiving additional funds beyond the \$3,750 that is allocated each year.
- c. CSM expenses incurred by the SIG for speaker honorariums/reimbursements are paid for by the AOPT up to \$600. Expenses exceeding the allotted \$600/SIG amount will be funded from the applicable SIG's \$3,750 budget if funds are available, or from the SIG's encumbered funds. Speaker reimbursement for CSM will follow the AOPT guidelines for Speaker Reimbursement listed in the AOPT Education Policy, Item 1.C.
- d. Each SIG will appear in the AOPT budget as a program and be managed in the same manner as other budgetary programs of the AOPT. The AOPT office will reimburse budgeted expenses with proper documentation. A report showing expenses paid will be sent to SIG Presidents quarterly.
- e. SIG budgets shall be submitted to the AOPT office by June 15<sup>th</sup> each year. Compliance to SIG policies shall be the responsibility of the SIG. Compliance to AOPT policies will be monitored by the Finance Committee with the projects and figures adjusted to assure compliance.
- f. All SIG finances shall be managed and controlled through the AOPT office with the Executive Director and AOPT President as fiscal administrators.
- g. If the SIG desires to undertake a special project/educational course and the project/course requires funding beyond the budgeted \$3,750, the SIG must follow the guidance and oversight provided by the Education Committee working in conjunction with the Executive Director and BOD.
- h. Utilization of the SIG Encumbered Funds:
  - i. The current status of each SIG budget will be sent to the SIG President on a quarterly basis (each January 1<sup>st</sup>, April 1<sup>st</sup>, July 1<sup>st</sup>, and October 1<sup>st</sup>). This budget will be an Excel document and will include all budgeted expenses, current and year-to-date income and expenses, and current amount of encumbered funds.

- ii. The SIG may budget use of their encumbered funds through the normal budgetary process, which includes the customary review and approval of the Finance Committee and AOPT Board of Directors.
- iii. SIG's are eligible to apply for research grants through the Research Committee's Small Grant Program. Money for these grants are to come from the SIGs encumbered funds.

#### 4. SIG and AOPT Web Site

- a. Information on SIG Websites
  - i. The following information will be included on each SIG website
    - 1. Directory of officers
    - 2. Educational programming, if applicable
    - 3. SIG Strategic Plan
    - 4. SIG activities and initiatives
  - ii. SIG documents may be posted to the SIG website only after they have been reviewed and approved by the SIG Governing Board and the Board Liaison to the SIG. Once posted, the SIG officers are responsible for ensuring that the posted documents are kept up to date. The SIG is responsible, with cooperation of the AOPT office, for maintaining its web pages content for current applicability.
- b. Posting of SIG Membership Lists
  - i. Special Interest Group websites include a membership directory.
- c. SIG Posting of Courses/Conferences sponsored by entities not affiliated with the AOPT or APTA will be handled on a case-by-case basis with the determination based on appropriateness of content and avoidance of conflict of interest.
- d. Use of AOPT's E-Commerce Website:
  - i. Each SIG is entitled to place items, including forms, information packets, etc., on the AOPT E-Commerce website for sale to SIG and AOPT members and non-members. All SIG items to be submitted will be reviewed by the SIG Board Liaison prior to being sent to the AOPT office.
  - ii. Once approved by the Board Liaison, the SIG will submit the completely finished item(s) to be placed on the website to the AOPT's Assistant Executive Director, who will work with the AOPT web designer to place the item for sale on the AOPT E-Commerce website.
  - iii. All profits from the sale of SIG items to AOPT members and non-members will be placed in the SIG's encumbered fund account.

#### 5. General Administration of SIG's

- a. Submissions to the *Orthopaedic Physical Therapy Practice (OPTP)*
  - i. The SIG President will review all SIG-related submissions to *OPTP* at the request of the *OPTP* Editor. Any SIG submission to *OPTP* must be submitted at least five days before the deadline to allow adequate time for the review process.
- b. Funding of Practice Analysis
  - i. AOPT sponsored funding for a practice analysis is limited to SIGs only. The first source of funding for a practice analysis would be from SIG Encumbered Funds. If enough funds are not available, the SIG will present a proposal requesting funding or the analysis to the AOPT Board of Directors for approval.
- c. Procedure for Forming a SIG

- i. If a group of AOPT members desire to develop a SIG, the prospective SIG will first be recognized as an Education Interest Group (EIG). See the EIG policy for information of EIGs.
  - d. Use of AOPT Booth at Non-AOPT Sponsored Functions or Meetings
    - i. If a SIG requests to exhibit at a non-AOPT sponsored function or meeting and wants to use the AOPT's exhibit booth as a display, the following steps must be adhered to:
      1. The request to exhibit at a conference must be presented at the time budgets are due to the AOPT office for approval by the Board of Directors and inclusion in the following year's budget (by June 15<sup>th</sup>).
      2. The AOPT Office will process all conference paperwork with regards to the exhibit booth, and will arrange for shipping to and from the conference site.
      3. The AOPT office will be informed of materials that need to be sent with the booth at least three weeks in advance to the booth being shipped to the exhibit location.
      4. It is the SIGs responsibility to inform the AOPT office the name/contact information of the person in charge of receiving the booth once it arrives onsite, who will be present at the booth during the conference, and who will be responsible for shipping the booth back to the AOPT office.
      5. Should any materials not be returned to the AOPT office following the conference, it will be the SIG's responsibility to reimburse the AOPT for the cost of the missing items. The same will apply to any items returned that have been damaged due to negligence (e.g., gross errors when replacing the exhibit display for shipping).
- e. Branding
  - i. AOPT members may imprint or affix the AOPT full name and/or "mark"/logo including but not limited to electronic media, stationary, publications, documents, advertisements of their professional services, materials promoting the physical therapy professional and other materials produced by the members provided that:
    1. Any such use of the "mark"/logo is approved by the AOPT office.
    2. The "mark"/logo is imprinted or affixed adjacent both to the AOPT member's name and to a statement of the member's relationship to the AOPT (e.g., "A member of the Academy of Orthopaedic Physical Therapy, APTA, Inc.:).
    3. A copy or sample of any such material produced by the AOPT member for public relations or public information is sent to the AOPT office for informational purposes.
    4. Any such use of the "mark"/logo is limited to office stationery, note pads, business cards, promotional fliers and brochures, print ads, and telephone book listings. The "mark/logo color, typeface, and size must comply with the Brand Standards Guide by Vendi Advertising v.012517 ([https://www.orthopt.org/uploads/content\\_files/files/Brand%20colors%20and%20fonts.pdf](https://www.orthopt.org/uploads/content_files/files/Brand%20colors%20and%20fonts.pdf)).

5. Any advertisement or promotional materials bearing the AOPT “mark”/logo or name, by individual AOPT members should be in accordance with the provisions set forth in the AOPT’s Policy Manual.
  6. Individual AOPT members having questions about the use of the AOPT “mark”/logo and name not covered in this policy should direct them to the Executive Director.
- f. Special Interest Group Mastheads
- i. SIGs must adhere to the AOPT and APTA logo policies for printed materials.
  - ii. It is the policy of the American Physical Therapy Association (APTA) Board of Directors that:
    1. The Association’s “mark”/logo is the property of the APTA. The “mark”/logo may be used only as designated and approved by the Association.
    2. APTA’s components shall incorporate the Association’s “mark”/logo into all printed and electronic communications, including those directed to the general public. All components shall clearly reflect in printed and electronic communications that they are a component of the Association, using the guidelines set forth in the APTA Graphic Standards Manual.
    3. Individual members may display the Association “mark”/logo in advertisements of their professional services and material promoting the physical therapy profession, provided that:
      - a. Use of the “mark”/logo complies with the guidelines set forth in the APTA Graphic Standard Manual; and
      - b. The “mark”/logo is imprinted or affixed adjacent to a statement of the member’s relationship to the Association (e.g., “A Member of the American Physical Therapy Association”); and
      - c. Any such use of the “mark”/logo is limited to office stationery, note pads, business cards, promotional fliers and brochures, print ads, and telephone book listings.
    4. Any advertisement or promotional material bearing the APTA “mark”/logo, produced by or for APTA components or individual members, must be in accordance with the provisions set forth in APTA’s Code of Ethics and Guide for Professional Conduct.
    5. Components, individual members and any other parties having questions about the use of the Association name and “mar”/logo not covered in this policy should direct their inquiries to the Chief Executive Officer of the American Physical Therapy Association.

## **6. Officer Dismissal**

- a. Due Process for Removing an Officer
  - i. When an elected SIG officer acts outside of their duties and responsibilities as stated in the SIG policies, a verbal warning will be given by the President.
  - ii. If a second incident occurs (not necessarily the same), notification will be made by the President via a written warning.
  - iii. If a third incident occurs, the individual will be removed from office pending a majority vote of the Executive Committee.

- iv. AOPT will send a certified letter to the individual by USPS mail stating the decision of the Executive Committee.

- b. Appeals Process

- i. Within 10 business days of receiving the notification of dismissal from office, the individual may submit a letter to the Executive Director if they choose to appeal the decision.
- ii. The Executive Director will forward the appeal to the President.
- iii. This appeal will be placed on the agenda for the next scheduled meeting of the Board of Directors.
- iv. The Board of Directors will take up this matter and make a final decision.
- v. AOPT will send a certified letter to the individual by USPS mail stating the decision of the Board.
- vi. There is no further appeal beyond this level.