

**INDIANA OCCUPATIONAL THERAPY ASSOCIATION, INC.**  
**STANDARD OPERATING PROCEDURES**  
**PRESIDENT**

**I. AUTHORITY:**

Authorized by Article VI of the Indiana Occupational Therapy Association, Inc. Bylaws,2022

**II. FUNCTION:**

The President is the chief executive officer of the IOTA, Inc. and is accountable to the voting members of the Association.

**III. OFFICE:**

A. Term of Office: Elected as President-Elect for a one-year term and assumes Presidency for a two-year term beginning at the annual meeting of members.

B. Right and Privileges: Refer to Article VI of the IOTA, Inc. Bylaws.

**IV. RESPONSIBILITIES:**

A. Identify professional needs of the membership.

B. Seeks out and appoints Standing and Special Committee Chairpersons in accordance with the Bylaws.

C. Identifies, clarifies, and charges tasks to be performed in order to meet the Association's objectives.

D. Directs the efforts of the Board of Directors in establishing and attaining the objectives and priorities of the Association through its Strategic Plan.

E. Conducts the meetings of the Board of Directors and of the membership in accordance with the requirements established in the Bylaws.

F. Assumes responsibility for bringing matters of concern of the profession and the Association before the Board and members.

G. Assumes responsibility for bringing matters of concern of the Association to local, state, and national organizations.

H. Answers all correspondence that requires the President's response and directs all other correspondence to appropriate officers and committee chairpersons.

I. Has the power to sign all written obligations of IOTA, Inc.

J. Attends the meetings of the Affiliated State Association Presidents of AOTA.

K. Serves as contact person to distribute communication from AOTA to membership and to initiate state level action as requested by AOTA.

L. Presides at all annual meetings of members and Board meetings of the IOTA, Inc.

M. Shall be an ex-officio member of all committees except the Executive Committee, Bylaws Committee, and Finance Committee, of which the President is a member.

N. Establish and give notice to appropriate members of the date, time, and place of the annual meeting of members and all meetings of the Board of Directors.

O. Create agendas for the annual meeting of members and all meetings of the Board of Directors.

P. Determines and calls special meetings of the Board and of the members as necessary.

Q. Supervises and evaluates IOTA, Inc. staff/employees.

**V. COMMUNICATIONS:**

A. Communicates the new President to AOTA.

B. Report of activities to Board of Directors - quarterly. If unable to attend the Board meeting, the report should be sent to the Secretary 48 hours prior to the meeting date.

**VI. BUDGET:**

A. Shall submit a budget request form supplied by the Treasurer for expenses incurred to represent IOTA, Inc.

B. Approved budget will not be exceeded except by authority of the Board of Directors as recommended by the Finance Committee. A written request for additional monies with detailed explanation will be submitted to the Treasurer in advance.

VII. ETHICAL CONSIDERATIONS:

A. All minutes and reports of the IOTA, Inc. are available to members.

B. Removal from office due to failure to fulfill duties, conflict of interest, or other reason would be carried out under Article VI, Sections 18 and 20 of the IOTA, Inc. Bylaws, 2022 and Occupational Therapy Code of Ethics (AOTA, 2015).

C. Procedures of ethics shall conform to the stipulation of AOTA Bylaws and IOTA, Inc. Bylaws.

**INDIANA OCCUPATIONAL THERAPY ASSOCIATION, INC.  
STANDARD OPERATING PROCEDURES  
VICE PRESIDENT**

**I. AUTHORITY:**

Authorized by Article VI of the Indiana Occupational Therapy Association, Inc. Bylaws, 2022.

**II. FUNCTION:**

The Vice President's primary responsibility is to plan and coordinate continuing education events, including the annual IOTA Fall and Spring Conferences as Chair of the Conference Planning Committee. The Vice President is to assist the President in charging of duties and assume the responsibilities of the President in his/her/they absence.

**III. OFFICE:**

A. Term of Office: Elected as Vice President-Elect for a one-year term and assumes Vice Presidency for a two-year term beginning at the annual meeting of members.

B. Right and Privileges: Refer to Article VI of the IOTA, Inc. Bylaws.

**IV. RESPONSIBILITIES:**

A. Assume duties of and responsibilities of President in his/her/they absence.

B. Assume all duties as assigned by President of Board of Directors.

C. Prepare, submit and follow approved budget for continuing education events.

D. Plan and implement a conference and continuing education events.

E. Supervise continuing education credit manager to send out all certificate correspondents following events.

F. Provide treasurer with all cost and billing information for continuing education and conference events

G. Serve as Chairperson of Practice/Continuing Education Committee, as stated in Article IX, Section 2 (3) of the Bylaws.

H. Attend all meetings of the Board of Directors.

I. Attend meetings as requested by the President.

J Attend all executive committee meetings

**V. COMMUNICATIONS:**

A. Report of activities to Board of Directors - quarterly. If unable to attend Board meeting, the report should be sent to the Secretary 48 hours prior to the meeting date.

B. Create and prepare for publishing, materials related to continuing education events.

**VI. BUDGET:**

A. Shall submit a budget request form supplied by the Treasurer to cover the annual conference and all continuing education programs.

B. Approved budget will not be exceeded except by authority of the Board of Directors as recommended by the Finance Committee. A written request for additional monies with detailed explanation will be submitted to the Treasurer in advance.

**VII. ETHICAL CONSIDERATIONS:**

A. All minutes and reports of the IOTA, Inc. are available to members.

B. Removal from office due to failure to fulfill duties, conflict of interest, or other reason would be carried out under Article VI, Sections 18 and 20 of the IOTA, Inc. Bylaws, 2022 and Occupational Therapy Code of Ethics (AOTA, 2015).

C. Procedures of ethics shall conform to the stipulation of AOTA Bylaws and IOTA, Inc. Bylaws.

**INDIANA OCCUPATIONAL THERAPY ASSOCIATION, INC.  
STANDARD OPERATING PROCEDURES  
SECRETARY**

**I. AUTHORITY:**

Authorized by Article VI of the Indiana Occupational Therapy Association, Inc. Bylaws, 2022.

**II. FUNCTION:**

The Secretary shall be the custodian to the corporate record (except financial records) of the IOTA, Inc.

**III. OFFICE:**

A. Term of Office: Elected for two-year term beginning with calendar year following annual meeting of members in which Secretary is elected.

B. Right and Privileges: Refer to Article VI of the IOTA, Inc. Bylaws.

**IV. RESPONSIBILITIES:**

**A. Meetings:**

1. Shall prepare the agenda and give proper notice for each Board meeting.
2. Attend all meetings of the Board of Directors.
3. Collects and determines validity of proxies submitted prior to commencement of all meetings. Refer to Article V, Section 7 of the IOTA, Inc. Bylaws.
4. Call roll at Board meetings and determine if there is a quorum.

**B. Minutes:**

1. Record minutes of the Board meetings, annual meeting of members, and other assigned committees.
2. Maintain electronic documentation of minutes for all meetings, making corrections as directed by the Board of Directors.
3. Provide rough draft of meeting minutes to the President and board members for review and revision, and then forward to designated individual for distribution and posting on website within two weeks after Board of Directors meetings following minute approval.

**C. Correspondence:**

1. Report occurrence of formal correspondence at Board of Directors meetings.
2. Conduct other correspondence as requested by Board of Directors.

D. Shall submit a current copy of the IOTA, Inc. Bylaws to the Secretary of AOTA annually if changes in the Bylaws occur.

E. Attend all executive committee meetings

**V. COMMUNICATIONS:**

A. Report of activities to Board of Directors - quarterly. If unable to attend Board meeting, the report should be sent to the President prior to the meeting date.

**VI. BUDGET:**

A. Shall submit a budget request form supplied by the Treasurer for incurred expenses.

B. Approved budget will not be exceeded except by authority of the Board of Directors as recommended by the Finance Committee. A written request for additional monies with detailed explanation will be submitted to the Treasurer in advance.

**VII. ETHICAL CONSIDERATIONS:**

A. All minutes and reports of the IOTA, Inc. are available to members.

B. Removal from office due to failure to fulfill duties, conflict of interest, or other reason would be carried out under Article VI, Sections 18 and 20 of the IOTA, Inc. Bylaws, 2022 and Occupational Therapy Code of Ethics (AOTA, 2015).

C. Procedures of ethics shall conform to the stipulation of AOTA Bylaws and IOTA, Inc. Bylaws

**INDIANA OCCUPATIONAL THERAPY ASSOCIATION, INC.**  
**STANDARD OPERATING PROCEDURES**  
**TREASURER**

**I. AUTHORITY:**

Authorized by Article VI of the Indiana Occupational Therapy Association, Inc. Bylaws, 2022.

**II. FUNCTION:**

The Treasurer shall manage all fiscal transactions and work to improve the financial integrity of IOTA, Inc.

**III. OFFICE:**

A. Term of Office: Elected as Treasurer-Elect for a 1-year term and assumes Treasurer position for a 2-year term beginning January 1 of year following the annual meeting of members in which the Treasurer is elected.

B. Right and Privileges: Refer to Article VI of the IOTA, Inc. Bylaws.

**IV. RESPONSIBILITIES:**

A. Manage all fiscal transactions

1. Record all revenue and expenditures in accounting software.
2. Maintain balanced checking account.
  - a. Write checks or pay expenses.
  - b. Record deposits and process with bank.
  - c. Reconcile the checking account.
  - d. Upload all bank statement to electronic document storage system

B. Monitor the budget

1. Retain record of minimum balance for IOTA, Inc.
2. Revise budget upon Board of Directors approval.

C. Serve as Chairperson for Finance Committee, as stated in Article IX, Section 2(6) of the Bylaws.

1. Develop a balanced budget proposal for the Fiscal Year (January 1 - December 31) with assistance of the Finance Committee.
2. Finance Committee appoints person(s) to audit IOTA's fiscal reports for the Fiscal Year. This is generally done within the first two months of the new Fiscal Year.

D. File all records and reports for audit.

E. Attend all meetings of the Board of Directors.

F. Present expense sheets to Board of Directors, which have incurred since preceding Board meeting.

G. Attend all executive committee meetings.

**V. COMMUNICATIONS:**

A. Report of activities to Board of Directors - quarterly. If unable to attend Board meeting, the report should be sent to the Secretary 48 hours prior to the meeting date.

B. Finance Committee activities that require Board of Directors action will be submitted with recommended activities in writing to the Board of Directors.

C. Annual Report

1. Summary of all revenue and expenditures with respect to the Fiscal Year Budget and the Treasurer's activities for the year is submitted at the Board of Directors meeting following the end of the Fiscal Year.
2. Provide financial report at annual meeting of members.

**VI. BUDGET:**

A. Shall submit a budget request form to Board of Directors for incurred expenses.

B. Approved budget will not be exceeded except by authority of the Board of Directors as recommended by the Finance Committee. A written request for additional monies with detailed explanation will be submitted to the President in advance.

## VII. ETHICAL CONSIDERATIONS:

- A. All minutes and reports of the IOTA, Inc. are available to members.
- B. Removal from office due to failure to fulfill duties, conflict of interest, or other reason would be carried out under Article VI, Sections 18 and 20 of the IOTA, Inc. Bylaws, 2022 and Occupational Therapy Code of Ethics (AOTA, 2015).
- C. Procedures of ethics shall conform to the stipulation of AOTA Bylaws and IOTA, Inc. Bylaws.

### Expenditures

1. An expense sheet will be presented to the Treasurer by members needing reimbursement.
2. Legible receipts (originals or copies) must be attached to the expense sheet. Digital copies are acceptable
3. Expense sheets must be reported to the Board of Directors at each Board meeting.

### Bounced Checks

1. The Treasurer will be notified of bounced checks.
2. Contact the person whose check bounced to let them know and have them write a new check.
3. Enter the bounced check and subtract from the balance in the checkbook.

### Income Taxes

1. For the fiscal year (January 1 to December 31), taxes must be completed by May following the end of the fiscal year.
2. Treasurer's books MUST be audited in accordance with the IOTA, Inc. By-Laws.
3. Obtain the following tax forms
  - a. Form 990 (Return Organization Exempt from Income Tax)  
Obtain from: Internal Revenue Service
  - b. Form NP-20(Return for Not-for-Profit Organization Exempt from Indiana Gross Income Tax)  
Obtain from: Indiana Department of Revenue
4. Donations are reported to the general fund. Keep track of the date the contributions were received, the name of the donor, address of the donor, and amount of the donation.

Note we are not the Not-for-Profit classification that allows donations to be tax deductions.

5. Both the IRS and Indiana Department of Revenue have a copy of the By-Laws. If the By-Laws are revised, be sure to send new copies.
6. There is no maximum amount of money IOTA, Inc. can make to retain the Not-for-Profit status.
7. We are only partially exempt from paying taxes because we are considered a business association.
8. We are exempt from paying MOST sales tax. Use the Federal Employer Identification Number 31-1220422 for items except those where individual persons will benefit (meals, rented rooms if same rooms will be used for banquets, etc.). Tax-exempt purchases might include duplication of newsletter; brochures, etc. and purchase of materials, such as envelopes, etc.
9. Our federal determination letter (in tax folder) has designated us exempt under Section 501 (c)(6) on Form 990. Remember, this is for federal taxes. TAX EXEMPT FROM FEDERAL TAXES BUT PARTIALLY EXEMPT FROM STATE TAXES.
10. Form 990 has to be filled out "completely" if IOTA, Inc. averages \$10,000 or more in the last three taxable years. Otherwise, just file the form with the IRS by completing only the top part (name, address, identifying numbers). Even though we are exempt from paying federal taxes, we must still fill out FORM 990.

### Preparation for Planning Fiscal Year Budget

A budget for the following year should be completed and presented to the Board of Directors for approval. In order to meet this deadline, the following time line is recommended. If the fiscal year is changed, this time line is to be changed accordingly.

1. Aug - Schedule a meeting with Finance Committee.
2. Sept/Oct - Hold meetings with Finance Committee.
  - a. Review budget proposals.
  - b. Design a balanced budget proposal.
  - c. Propose rates for:
    - i. Membership dues

- ii. Conference fees
- iii. Update and maintain travel and per diem reimbursement policy
- 3. October/November - Present budget proposal to Board of Directors.
- 4. October/November - Present budget proposal to annual meeting of members.

#### Annual Report

The Treasurer's annual report should include the following:

- 1. Present balance of all accounts
- 2. Expenses and revenue (budgeted amount and amount actually spent)
- 3. Contributions, if any, made by IOTA, Inc.

**INDIANA OCCUPATIONAL THERAPY ASSOCIATION, INC.  
STANDARD OPERATING PROCEDURES  
SPECIAL INTEREST SECTION CHAIR/CO-CHAIR**

**I. AUTHORITY:**

Authorized by Article VI of the Indiana Occupational Therapy Association, Inc. Bylaws, 2022.

**II. FUNCTION:**

The special interest section chair(s) shall guide and conduct special interest section activities and functions in accordance with the Bylaws of IOTA, Inc.

### III. OFFICE:

- A. Term of Office: Elected for two-year term beginning with calendar year following annual meeting of members.
- B. Right and Privileges: Refer to Article VI of the IOTA, Inc. Bylaws.

### IV. RESPONSIBILITIES:

- A. Serve on the Board of Directors of IOTA, Inc.
- B. Attend all Board meetings of IOTA, Inc. representing the special interest section members. In his/her/they absence, the special interest section chair will designate a representative authorized written proxy to attend and participate in the Board meeting. Board members can attend either in-person or virtually.
- C. Recommend members for appointment to committees when necessary to carry out the functions of IOTA, Inc.
- D. Coordinate at least three events per year and preside over these events or designate an alternate to perform this duty.
- E. Be responsible for ensuring that all charges given to the section by the IOTA, Inc. Board of Directors are completed.
- F. Disseminate pertinent information regarding IOTA, Inc. activities to section members.
- G. Provide networking opportunities to members including assisting with mentorship program.
- H. Facilitate discussions relevant to SI area

### V. COMMUNICATIONS:

- A. Report section activities at each Board meeting.
- B. Report Board of Directors activities at each section meeting.

### VI. BUDGET:

- A. Shall submit a budget request form supplied by the Treasurer for incurred expenses.
- B. Approved budget will not be exceeded except by authority of the Board of Directors as recommended by the Finance Committee. A written request for additional monies with detailed explanation will be submitted to the Treasurer in advance.

### VII. ETHICAL CONSIDERATIONS:

- A. All minutes and reports of the IOTA, Inc. are available to members.
- B. Removal from office due to failure to fulfill duties, conflict of interest, or other reason would be carried out under Article VI, Sections 18 and 20 of the IOTA, Inc. Bylaws, 2022 and Occupational Therapy Code of Ethics (AOTA, 2000).
- C. Procedures of ethics shall conform to the stipulation of AOTA Bylaws and IOTA, Inc. Bylaws.

**INDIANA OCCUPATIONAL THERAPY ASSOCIATION, INC.  
STANDARD OPERATING PROCEDURES  
REPRESENTATIVE/ALTERNATE**

### I. AUTHORITY:

Authorized by Article VII of the Indiana Occupational Therapy Association, Inc. Bylaws, 2022.



## II. FUNCTION:

To serve in the AOTA Representative Assembly(RA) as a voting member for the State of Indiana.

## III. OFFICE:

A. Representative and Alternate Representative to be elected by the AOTA members in good standing within a state election area in cooperation with the AOTA, Inc. to the extent the Board of Directors determines to be reasonably possible.

B. Term of Office: Three years.

C. Right and Privileges: Shall have and may exercise all of the power provided by IOTA, Inc. By-Laws or as assigned from time to time by the President or the Board of Directors. The Representative is a non-voting member of the IOTA, Inc. Board. The alternate may attend IOTA, Inc. Board meetings as a non-voting member in place of the Representative. Expenses to attend IOTA, Inc. Board Meetings are covered per the Travel and Lodging Policy.

D. Qualifications:

1. An Association member in good standing-as determined by the Professional Licensing Agency (PLA).
2. A member in good standing of the State Association at the time of the election and throughout the term of office.
3. Individuals shall have been a voting member of the Association for two years immediately prior to election.

## IV. RESPONSIBILITIES:

A. Be knowledgeable of the structure and functions of the RA and the structure and functions of the AOTA.

B. Represent the Association members of the election area from which elected.

C. Be available to constituents to assist with writing resolutions or motions or prepare them on their behalf.

D. Assist constituents to increase their effectiveness in influencing policy and procedures of the Association.

E. Encourage membership and participation in AOTA.

F. Attend IOTA Executive Board Meetings.

G. Be available at the IOTA Annual Fall Conference to encourage membership and participation in AOTA.

## V. MEETINGS

The representative and/or alternate will attend the AOTA Representatives Assembly at national conference.

## VI. COMMUNICATIONS:

A. Receive, disseminate, and explain information regarding business of the Association.

B. Communicate to constituents deadlines for Resolutions, Reports and Nominations for Awards and Elections.

C. Communicate with constituents before each scheduled RA meeting regarding business to be considered.

D. Communicate concerns and positions of the constituents to the RA or other appropriate AOTA body.

E. Report to constituents following each RA meeting regarding the business transacted.

F. Submit a written report of relevant information in a timely manner to each IOTA Executive Board Meeting.

## VII. BUDGET:

All budget requests to support the representative activities are submitted annually by 1 month prior to the IOTA Annual Fall Conference to the IOTA, Inc. Treasurer prior to implementation of the fiscal year in January.

## VIII. ETHICAL CONSIDERATIONS:

A. The representative/alternate will abide by the AOTA Code of Ethics.

B. The representative/alternate is subject to removal from the position by the President for failure to fulfill duties or for occasions of conflict of interest

**INDIANA OCCUPATIONAL THERAPY ASSOCIATION, INC.**  
**STANDARD OPERATING PROCEDURES**  
**BOARD OF DIRECTORS**

## I. AUTHORITY:

Authorized by Article VI, Section 1-21 of the Indiana Occupational Therapy Association, Inc. Bylaws, 2022.

**II. FUNCTION:**

To serve as the executive body of IOTA, Inc. by:

- A. Managing activities of IOTA, Inc.
- B. Recommending actions and proposed annual budget to the membership.
- C. Making expenditures within available resources to carry out functions of IOTA, Inc.

**III. MEMBERS:**

- A. President – Presiding officer (Vice-President in President’s absence)
- B. Elected Members – At-Large Members – President, Vice-President, Secretary, and Treasurer
- C. Elected by District – District Directors
- D. Non-voting Members: Representative and Alternate Representative to AOTA, Immediate Past President, President-Elect, and Treasurer-Elect

**IV. MEETINGS:**

- A. Meeting dates and places will be set by the Board and there will be no fewer than two meetings per year
- B. Board of Directors meetings are open to guests. The Board upon majority vote may close the meeting (executive session) to deal with confidential material. The minutes of the executive session will be read only in executive session.

**V. ADDITIONAL RESPONSIBILITIES:**

- A. Make and process policy and procedures governing IOTA, Inc.
- B. Make recommendations for By-Laws changes to the By-Laws Committee.
- C. Design and revise Strategic Plan recommendation for membership action.
- D. Make and process actions to carry out IOTA, Inc. functions. Actions will be brought to the Board in the form of a motion. Motion must be passed by a majority vote of voting Board members. Board of Directors will present appropriate actions to membership for approval.
- E. Make recommendations for AOTA awards.

**VI. COMMUNICATIONS:**

- A. Motions must be written on appropriate forms and submitted to the President.
- B. Board members will submit written reports according to their SOP.
- C. All responses to charges and other items are submitted to the President according to requested deadline.

**VII. BUDGET:**

Board of Directors will approve the proposed budget and will present to the membership for adoption.

**VIII. ETHICAL CONSIDERATIONS:**

- A. The past two years’ minutes and reports of the IOTA, Inc. are available to members.
- B. Removal from office due to failure to fulfill duties, conflict of interest, or other reason would be carried out under AOTA guidelines and Occupational Therapy Code of Ethics (AOTA, 2015).
- C. Procedures of ethics shall conform to the stipulation of AOTA Bylaws and IOTA, Inc. Bylaws.

**INDIANA OCCUPATIONAL THERAPY ASSOCIATION, INC.  
STANDARD OPERATING PROCEDURES  
MEMBERSHIP ACTIVITIES COMMITTEE**

**I. AUTHORITY:**

Authorized by Article IX, Section 2 (5) of the Indiana Occupational Therapy Association, Inc. Bylaws, 2022.

## II. FUNCTION:

The purpose of this Committee is to publish the quarterly IOTA, Inc. newsletter, recruit new and retain existing IOTA, Inc. members, contribute to the social media presence of IOTA, Inc., organize and monitor Executive Board elections during Fall Conference and maintain updated contacts list for Student Occupational Therapy Association faculty directors for all state of Indiana Occupational Therapy schools.

## III. OFFICE:

A. Chair: Appointed by the IOTA, Inc. President

B. Members: Appointed by the Chair. Members should assist the Chair in carrying out the responsibilities of the Committee As assigned

C. Term of Office: Committee appointments are made by the President by the first meeting of the Board of Directors after its annual meeting, and the term coincides with the President's term in office

Members – concurrent with Chair

D. Right and Privileges: Shall have and may exercise all of the power provided by IOTA, Inc. By-Laws or as assigned by the President or the Board of Directors. Chair may attend Board of Directors Meetings. Utilize Board of Directors liaison for communications and recommendations to the Board.

## IV. RESPONSIBILITIES:

A. Publish the IOTA, Inc. newsletter

1. Establish a template/format for emailed newsletter

2. Email and post on social media the newsletter to current members on a quarterly basis.

B. Contribute to the IOTA, Inc. social media presence

1. Contribute to social media during bi-annual conferences

2. Reach out to board members for 'OT spotlight' recommendations for consideration.

C. Enhance and encourage membership in the Association

D. Organize and monitor Executive Board elections before Fall Conference

E. Organize and monitor OT/OTA/OTS/OTAS of the year elections before Fall Conference

F. Maintain updated contacts list for Student Occupational Therapy Association faculty directors for all state of Indiana Occupational Therapy schools.

G. Ensure that the responsibilities and functions of the Committee are carried out and submit proposed changes as needed.

## V. MEETINGS:

A. Chair may attend all Board of Directors Meetings and IOTA, Inc. Meetings.

B. Chair will call meetings for members of the Committee as needed.

## VI. COMMUNICATIONS:

A. Minutes of all Committee meetings are maintained by the chair.

B. A prepared report is submitted to the Board liaison before each Board meeting. This report summarizes the activities of the Committee.

C. Committee activities requiring Board of Directors approval will be submitted with recommended actions in writing to the Board of Directors through the Membership Committee Chair.

## VII. BUDGET

A. Chair will submit a proposed budget to the Board of Treasurer when requested.

B. Data for the proposed budget should be based on the budget from the preceding year and plans for the upcoming year.

C. The budget approved at the Fall Conference will be effective through the following calendar year.

D. Approved budget will not be exceeded except as approved by the Board of Directors and reimbursement

**INDIANA OCCUPATIONAL THERAPY ASSOCIATION, INC.  
STANDARD OPERATING PROCEDURES  
LEGISLATIVE & ADVOCACY COMMITTEE**

**I. AUTHORITY:**

Authorized by Article IX, Section 2(4) of the Indiana Occupational Therapy Association, Inc. By-Laws, 2022.

## II. FUNCTION:

Shall monitor, review, and coordinate legislation which relates to the purpose of the Corporation.

## III. OFFICE:

A. Chair: Members of the Corporation appointed by the President.

B. Members: At least one Director of the Corporation. Other members of the Corporation or such other persons recommended by the chair and appointed by the President

C. Term of Office: Committee appointments are made by the President by the first meeting of the Board of Directors after its annual meeting, and the term coincides with the President's term in office

D. Right and Privileges: Shall have and may exercise all of the power provided by IOTA, Inc. By-Laws or as assigned to them by the President or the Board of Directors.

## IV. RESPONSIBILITIES:

A. Monitor changes in legislation concerning the Corporation.

B. Educate membership regarding updated legislative and payment for services information.

C. Prepare and implement plans to improve legislation for occupational therapy and the consumers served (the public) in Indiana.

D. Secure the lobbyist for each General Assembly.

E. Other responsibilities as charged from the President or Board of Directors.

F. Plan and implement an annual capitol day event.

## V. MEETINGS:

A. The Legislative & Advocacy Committee shall meet as necessary.

B. The chair and/or any member of the Committee may attend open meetings of the Board of Directors.

C. The Chair does attend the Board of Directors meetings and has a voice but no vote.

## VI. COMMUNICATIONS:

A. Reports from the Legislative & Advocacy Committee are maintained by the Chair and Secretary of IOTA.

B. Reports are presented in writing to the Board of Directors at each meeting of the Board.

C. The Legislative & Advocacy Committee will keep the membership informed of their activities via IOTA, Inc. communications.

## VII. BUDGET

All budget requests to support the Committee's activities are submitted to the Treasurer as requested.

## VIII. ETHICAL CONSIDERATIONS:

A. All Committee members will abide by the AOTA Code of Ethics.

B. All Committee members are subject to removal from the Committee by the President for failure to fulfill duties or for occasions of conflict of interests.

**INDIANA OCCUPATIONAL THERAPY ASSOCIATION, INC.  
STANDARD OPERATING PROCEDURES  
APPROVED PROVIDER COMMITTEE**

## I. AUTHORITY:

Authorized by Article IX, Section 2(7) of the Indiana Occupational Therapy Association, Inc. By-Laws, 2022.

## II. FUNCTION:

This committee is charged with the responsibilities of authorizing continuing education (CE) providers to issue approved IOTA continuing education hours (CE hours).

## III. OFFICE:

A. Chair: Appointed by the President.

B. Members: Appointed by the President and include the Vice President. President may accept Chair recommendations.

C. Term of Office: Committee appointments are made by the President by the first meeting of the Board of Directors after its annual meeting, and the term coincides with the President's term in office

D. Rights and Privileges: Shall have and may exercise all the power provided by IOTA, Inc. By-Laws or as assigned by the President or the Board of Directors. May attend all Board of Directors meetings.

## IV. RESPONSIBILITIES:

A. The APP assures that continuing education offered by Approved Providers is relevant to occupational therapy practitioners in the state of Indiana and corresponds with criteria for continuing education described by the IPLAOTC CE requirements.

B. Review applications and determine acceptance using designated criteria presented in the Program Description.

C. Review and update Program Description and Criteria as needed

D. Complete sample audits to ensure validity of provider completion of responsibilities.

## V. MEETINGS:

A. The APP Committee shall meet as necessary.

B. The Chair and any committee member may attend open meetings of the Board of Directors. The Chair attends the Board of Director meetings when requested to do so.

## VI. COMMUNICATIONS:

A. The APP shall keep a record of all its proceedings and actions.

B. A summary report of the committee proceedings and actions are to be provided at each quarterly board meeting.

C. The APP and the Executive Assistant or appointed person will collaborate to ensure smooth communications between continuing education provider applicants, APP committee members, and advertisements on the IOTA website.

## VII. BUDGET:

Chair will submit a budget request form as needed to the Treasurer.

## VIII. ETHICAL CONSIDERATIONS:

A. Procedures of ethics shall conform to the stipulations of AOTA By-Laws and IOTA, Inc. By-Laws.

B. The Board of Directors will handle any conflict of interest that is unsolvable by the Chair.

**INDIANA OCCUPATIONAL THERAPY ASSOCIATION, INC.**  
**STANDARD OPERATING PROCEDURES**  
**DEI COMMITTEE**

## I. AUTHORITY:

Authorized by Article IX, Section 2 (8) of the Indiana Occupational Therapy Association, Inc. Bylaws, 2022.

## II. FUNCTION:

The purpose of this Committee is to promote the education and importance of diversity, equity, and inclusion in the field of occupational therapy in Indiana. Assure current state practices align with DEI initiatives.

## III. OFFICE:

A. Chair: Appointed by the IOTA, Inc. President

B. Members: Appointed by the Chair. Members should assist the Chair in carrying out the responsibilities of the Committee as assigned

C. Term of Office: Committee appointments are made by the President by the first meeting of the Board of Directors after its annual meeting, and the term coincides with the President's term in office C. Term of Office: Chair- one year  
Members – concurrent with Chair

D. Right and Privileges: Shall have and may exercise all of the power provided by IOTA, Inc. By-Laws or as assigned by the President or the Board of Directors. Chair may attend Board of Directors Meetings. Utilize Board of Directors liaison for communications and recommendations to the Board.

## IV. RESPONSIBILITIES:

A. Plan and implement educational opportunities to promote DEI in Indiana.

B. Advise committees and districts on best practices of DEI for speakers and other opportunities.

C. Ensure that the responsibilities and functions of the Committee are carried out and submit proposed changes as needed.

## V. MEETINGS:

A. Chair may attend all Board of Directors Meetings and IOTA, Inc. Meetings.

B. Chair will call meetings for members of the Committee as needed.

## VI. COMMUNICATIONS:

A. Minutes of all Committee meetings are maintained by the chair.

B. A prepared report is submitted to the Board liaison before each Board meeting. This report summarizes the activities of the Committee.

C. Committee activities requiring Board of Directors approval will be submitted with recommended actions in writing to the Board of Directors through the Membership Committee Chair.

## VII. BUDGET

A. Chair will submit a proposed budget to the Board of Treasurer when requested.

B. Data for the proposed budget should be based on the budget from the preceding year and plans for the upcoming year.

C. The budget approved at the Fall Conference will be effective through the following calendar year.

D. Approved budget will not be exceeded except as approved by the Board of Directors and reimbursement

**INDIANA OCCUPATIONAL THERAPY ASSOCIATION, INC.  
STANDARD OPERATING PROCEDURES  
EXECUTIVE COMMITTEE**

## I. AUTHORITY:

Authorized by Article IX, Section 2(1) of the Indiana Occupational Therapy Association, Inc. Bylaws, 2022.

## II. FUNCTION:

The purpose of this Committee is to follow up on business brought to the Executive Board and monitor ongoing initiatives of the association.

## III. OFFICE:

A. Chair: President

B. Members: Vice President, Treasurer, Secretary and others as assigned

C. Term of Office: term coincides with elected position terms or as agreed upon with president

D. Right and Privileges: Shall have and may exercise all of the power provided by IOTA, Inc. By-Laws or as assigned by the President or the Board of Directors.

## IV. RESPONSIBILITIES:

A. Discuss business brought to board

B. Delegate task to appropriate committees

C. Enhance and carry out state association goals for improved opportunities within the state.

## V. MEETINGS:

A. Chair will call meetings for members of the Committee as needed.

## VI. COMMUNICATIONS:

A. Minutes of all Committee meetings are maintained by the secretary.

B. President report summarizes the activities of the Committee.

## VII. BUDGET

A. Chair will submit a proposed budget to the Board of Treasurer when requested.

B. Data for the proposed budget should be based on the budget from the preceding year and plans for the upcoming year.

C. The budget approved at the Fall Conference will be effective through the following calendar year.

D. Approved budget will not be exceeded except as approved by the Board of Directors and reimbursement

**INDIANA OCCUPATIONAL THERAPY ASSOCIATION, INC.  
STANDARD OPERATING PROCEDURES  
EXECUTIVE ASSISTANT**

## I. AUTHORITY:

Authorized by Article VII, of the Indiana Occupational Therapy Association, Inc. By-Laws, 2022.



## II. FUNCTION:

This position shall be responsible for the general direction of the affairs and operation of the Association in accordance with policies and job description approved by the Board. The Executive Assistant may not be a member of the Board of Directors, but shall serve as an ex officio, non-voting, advisory member of the Board.

## III. OFFICE:

A. The executive assistant will be appointed and employed by the Board of Directors.

B. Rights and Privileges: as assigned by the President or the Board of Directors. May attend all Board of Directors meetings.

## IV. RESPONSIBILITIES:

A. Monitor IOTA email address, forward and/or respond within 48 hours of receipt.

A. Send email blast and/or social media updates as requested

B. Check PO box bi monthly and forward or respond appropriately

C. Deposit all checks received by mail or in person by end of each month

D. Create and monitor conference registration biannually and other duties assigned by conference committee

E. Update and maintain website for board member requested changes

F. Maintain and manage job board and sponsorship for website

G. Support APP committee

H. Support conference committee in sponsorship and vendors

I. EA will submit a monthly timesheet to the president and treasurer by 5th of each month

J. Other responsibilities as assigned

## VI. COMMUNICATIONS:

A. The EA will forward or respond to all emails from membership or others within 48 hours

B. A summary report of proceedings and actions are to be provided at each quarterly board meeting.

## VII. BUDGET:

EA will submit a budget request form as needed to the Treasurer.

## VIII. ETHICAL CONSIDERATIONS:

A. Procedures of ethics shall conform to the stipulations of AOTA By-Laws and IOTA, Inc. By-Laws.