

# Policy Manual

2019 Edition\*

Updated 07/2025

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<p><b>*Please note that currently there are no electronic versions of these policies. Contact the Practice Group and the staff will provide you with a hard copy.</b></p> <p><b>**Policy number 3.9 (the number) was used twice and refers to two separate policies; however, both times the number was used, the policies were rescinded.</b></p>			
<p>The Representative Assembly's E Policies, which include official documents and professional standards guiding the occupational therapy profession, are publicly available. These documents can be accessed on the AOTA Official Documents page under the section for Representative Assembly Policies:</p> <p>◆ <a href="#"><u><b>AOTA Official Documents – Representative Assembly Policies</b></u></a></p>			

**POLICY A.1**

Subject: **Policy Manual**

Code: **RA Motion 10/77, 2003M54, 2010AprC1**

**PURPOSE:** To establish policies consistent with Association objectives.

**IT SHALL BE THE POLICY OF THE ASSOCIATION THAT:**

1. The Association supports membership input regarding current trends in practice, education, and research for use in the formation of policy.
2. The Board coordinates and ensures that appropriate mechanisms for development and implementation of the policy are established.
3. Association staff, members, and volunteers shall utilize current policy when carrying out Association activities.
4. Policies shall be reviewed periodically to ensure that they reflect current practice. A procedure for doing this shall be the responsibility of the Secretary.
5. The policies shall be contained in the Association's *Policy Manual*. New and revised policies shall be published annually in an AOTA official publication for dissemination to members.

Effective: 10/77

Revised: 4/83, 4/85; 4/01, 6/03, 4/10, 7/15

BPPC Reviewed: 10/01, 1/02, 1/03, 1/10, 7/15

Rescinded:

**POLICY A.2**

Subject:       **Association Governance Manual**

Code:

**PURPOSE:**   To outline the contents of the Association's Governance Manual.

**IT SHALL BE THE POLICY OF THE ASSOCIATION THAT:**

1.     The Governance Manual shall contain copies of all official legal documents which guide the operations of the Association as identified through Board or Assembly action.
2.     The Governance Manual shall consist of the following documents:
  - a.    Articles of Incorporation
  - b.    Bylaws
  - c.    Policy Manual
  - d.    Standard Operating Procedures & Job Descriptions
  - e.    Governance Chart
  - f.    Links to Official Documents as adopted by the Assembly
3.     The Governance Manual shall be accessible to members on the Association Web site.

Effective: 11/15  
Revised:  
BPPC Reviewed: 7/15  
Rescinded:



**POLICY A.3**

Subject: **Corporate Logo**

Code: **RA Motion 10/77, 2003M54, 2009FebCS124**

**PURPOSE:** To establish policy for the selection and adoption of a corporate insignia.

**IT SHALL BE THE POLICY OF THE ASSOCIATION THAT:**

1. The Association shall establish a representative insignia for the corporation entitled "The American Occupational Therapy Association, Inc."
2. The insignia shall be called the Corporate Logo and shall be used to represent The Association, Inc.
3. The Board shall be responsible for the selection of an appropriate insignia and oversee the implementation of its use.
4. The Corporate Logo must be approved by the Board and application made to trademark said logo with the U.S. Patent and Trademark Office.
5. Corporate logos of The Association shall be owned by the Association, which shall hold the trademark.

Effective: 10/77

Revised: 4/97, 4/99, 6/03, 2/09

BPPC Reviewed: 10/01, 1/02, 1/03, 1/04, 1/09, 7/15

Rescinded:

**POLICY A.4**

Subject: **Copyright**

Code: **RA Motion 4/95, 2003M54, 2009FebCS125**

**PURPOSE:** To establish policy on materials copyrighted by the Association.

**IT SHALL BE THE POLICY OF THE ASSOCIATION THAT:**

1. The Association reserves the right to retain the exclusive rights available under the copyright laws of the United States and all International Copyright Conventions for every publication and product developed using any Association funds or resources and also reserves the exclusive rights to publish every publication and product developed using any Association funds or resources.
2. This policy shall be administered in the best interests of the Association consistent with copyright law and shall permit as appropriate licensing of Association materials.

Effective: 4/95

Revised: 4/01, 6/03, 2/09, 7/15

BPPC Reviewed: 10/01, 1/02, 1/03, 1/04, 1/09, 7/15

Rescinded:

**POLICY A.5**

Subject:       **Association Awards and Recognitions**

Code:         **RA Motion 4/83, 4/85, 2003M54, 2005CO287, 2009FebCS127, 2011AprC15**

**PURPOSE:**   To establish policy for Association awards and recognitions.

**IT SHALL BE THE POLICY OF THE ASSOCIATION THAT:**

1.       The Association shall recognize exceptional contributions to the development of the profession and/or service to the Association.
2.       The criteria for all awards will be established by the Volunteer Leadership Development Committee (VLDC) as approved by the Board:
3.       An official list of all awards criteria and procedures of selection shall be maintained in the Association's *Governance Manual* and be available on the Association Web site.

Effective: 4/83

Revised: 4/95, 4/97, 4/99, 4/01, 6/03, 11/05, 2/09, 7/15

BPPC Reviewed: 10/01, 1/02, 1/03, 9/05, 1/09, 9/11, 7/15

Rescinded:

**POLICY A.6**

**Subject: Open Meetings**

**Code: RA Motion 4/78, 4/89, 2003M54, 2007C7, 2007CO136, 2009FebCS128**

**PURPOSE:** To establish an open meetings policy for all Association meetings.

**IT SHALL BE THE POLICY OF THE ASSOCIATION THAT:**

1. All official meetings sponsored by the Association shall be open to the members except in the following instance(s), in which the meeting would be an executive session:
  - a. Discussion of specific personnel performance, hiring, or firing to protect personal information of/or relating to a member or employee of the Association, including Social Security number, compensation, and/or benefits.
  - b. All disciplinary proceedings in accordance with the Administrative Standard Operating Procedure (SOP) and attachments, all proceedings for an individual's alleged violations of the AOTA *Occupational Therapy Code of Ethics* (Code), and any other proceeding which is explicitly designated as confidential in an SOP.
  - c. When disclosing confidential proprietary information relating to the operations of the Association, including business sensitive information such as detailed budget information; revenues, expenses, or future business plans and services; terms of agreements with vendors and other sensitive agreements; lists of members or subscribers' names and addresses; and internal information relating to technology.
  - d. Confidential legal communications with Legal Counsel.
  - e. An exceptional reason that, by a vote of two thirds of the members present at the meeting, they find the reason to be so compelling as to close the meeting.
  - f. Electronic and telephonic meetings other than Assembly online meetings.

Effective: 5/78

Revised: 4/89, 4/99, 5/02, 6/03, 11/03, 4/07, 11/07, 2/09, 2/17

BPPC Reviewed: 10/01, 1/02, 1/03, 9/03, 1/07, 9/07, 1/09, 7/15, 1/17

Rescinded:

**POLICY A.7**

Subject: **Censure**

Code: **RA Motion 3/81, 2004C56, 2006C400/401, 2009FebCS129**

**PURPOSE:** To establish policy on censure.

**IT SHALL BE THE POLICY OF THE ASSOCIATION THAT:**

1. All elected and appointed volunteer leaders may be censured for:
  - a. Misconduct: Any behavior, public or private, that reflects negatively on one's professional role, the profession, and/or the Association is a violation of the *Occupational Therapy Code of Ethics*. Additionally, proven unethical behavior in the conduct of the position held or any proven conduct that reflects negatively on the reputation of the profession or Association.
  - b. Gross neglect of duty and/or failure to perform in good faith the duties of the elected office or volunteer position as outlined in the standard operating procedures (SOPs)/job descriptions (JDs).

Effective: 3/81

Revised: 6/93, 4/97, 4/99, 4/00, 5/04, 4/06, 2/09, 7/15

Reviewed BPPC: 10/01, 1/02, 1/03, 1/04, 1/06, 1/09, 7/15

Rescinded:

**POLICY A.8**

**Subject: Removal and Appeal**

**Code: RA Motion 4/85 (Substitution for Policies 1.15.1, 1.15.2, 1.15.3), 2003M54, 2004CO165, 2006C321/322, 2009FebCS130**

**PURPOSE:** To establish policy concerning removal and appeal of volunteer leaders.

**IT SHALL BE THE POLICY OF THE ASSOCIATION THAT:**

1. All elected and appointed volunteer leaders may be removed for:
  - a. Failure to accurately report or maintain qualifications for the office or position held, including maintaining the credentials and criteria for eligibility for the office, or
  - b. Failure to perform official duties of the office or position held as defined in the governance documents, or
  - c. Failure to declare a material conflict of interest in violation of the Association's official policy or other action/omission of influence, or
  - d. Misuse of proprietary or confidential information, or
  - e. Violation of any fiduciary duty, or
  - f. Proven unethical behavior in the conduct of the position held or any proven conduct that reflects negatively on the reputation of the profession or Association.
2. The procedure for removal and appeal shall be contained in the Association's Administrative Standard Operating Procedures.

Effective: 4/85

Revised: 6/93, 4/97, 4/99, 4/00, 11/04, 4/06, 2/09, 7/15

BPPC Reviewed: 10/01, 1/02, 9/04, 1/06, 1/09, 7/15

Rescinded:

## Policy A.9

**Subject: Online/Social Media Policy for Volunteers**

**Code:** BoD 01-06272025

**Purpose:** To establish a policy regarding online/social media use by Association volunteers.

**IT SHALL BE THE POLICY OF THE ASSOCIATION THAT:** While posting on the Internet, regardless of whether the site is affiliated with AOTA or not, volunteers must adhere to the following online/social media guidelines:

- 1) **Respect and Online Decorum.** Always communicate with respect. Avoid engaging in arguments or negative discussions. Inappropriate posts/content are prohibited. Inappropriate posts/content may include disrespectful, damaging, inflammatory, extraneous, harassing, or discriminatory content. Any inappropriate posts/content that meets the criteria described above may subject the post author to disciplinary action.
- 2) **Engagement and Interaction.** Positively engage with followers and members. Address conflicts or disputes privately and professionally. Do not engage in public arguments.
- 3) **Be Honest and Accurate.** Ensure the information or news you share is accurate and up to date. If a mistake is made, correct it quickly and be open about any previously altered posts/content. The Internet archives almost everything; therefore, even deleted posts/content can be searched. If factually inaccurate posts/content about AOTA are identified, contact [social@aota.org](mailto:social@aota.org).
- 4) **Respect Intellectual Property.** Refrain from sharing or publishing confidential information or private discussions held within the AOTA community. Ensure posted content is not proprietary or confidential to the Association or any other individual or organization.
- 5) **Identify Yourself.** Be aware of your association with AOTA while online. If you identify yourself as an AOTA volunteer or member, ensure your profile and related content is consistent with how you wish to present yourself with colleagues, members, and beyond. Be mindful of the forum/venue you participate in as well; be sure it is consistent with the values and policies of the Association.

Effective: 11/15

Revised: 06/2025

Reviewed by BPPC: 07/2025

Approved by Board: 06/2025

- 6) **Disclaimers.** While everyone has the right to express personal opinions online or on their personal social media accounts, it is important to make clear your views do not necessarily reflect those of AOTA. If you have identified yourself as an AOTA volunteer in your profile settings, or in any post or content, your opinions will be perceived as those of the Association. Therefore, be sure to include a disclaimer, such as *“I am representing AOTA in my role as [volunteer leader position].”* Conversely, clarify that *“This is my personal opinion, and does not represent my work with AOTA”* when you are sharing your personal views. If identifying your personal versus professional posts/content is impractical, consider creating a different user account for posts/content related to your volunteer position.
- 7) **Reporting Process.** AOTA actively monitors comments on official AOTA social media/online accounts. Though AOTA cannot control what an individual posts online, if an inappropriate or problematic post/content is brought to the attention of AOTA, appropriate action will be taken. If you see activity that violates this Policy, please contact AOTA at [social@aota.org](mailto:social@aota.org). Please include your contact information and a clear explanation of the issue you are reporting.
- 8) **AOTA Social Media Accounts.** Only designated AOTA employees may create, maintain, or serve as administrators of official AOTA social media/online accounts. These designated contacts are responsible for keeping login information secure and unique for every account.

## ADDITIONAL GUIDELINES FOR AOTA BOARD MEMBERS

- 1) **Fiduciary Duty.** In addition to their adherence to the above Policy guidelines, AOTA Board Members must honor their fiduciary duty online [e.g., social media, message boards (e.g., CommunOT), websites, etc.].
- 2) **Reputation Management.** All AOTA Board Members are public figures and, as such, serve as AOTA Brand Ambassadors. Online behavior – all things said and done online - directly reflect on the organization and its reputation, regardless of intent.
- 3) **Disclaimers.** When AOTA Board Members write or speak, people may assume they are speaking on behalf of the organization. AOTA Board Members must be careful not to state or imply organizational commitments, approvals, or endorsements, and must include standard disclaimer(s) on public-facing social media accounts, message boards, and/or websites, as outlined in Item 6 above.
- 4) **Alignment to AOTA Strategic & Operational Objectives.** AOTA Board Members must always act in the organization's best interests. Online behavior –

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Approved by Board: 06/2025



all things said and done online – must align with AOTA’s strategic and operational objectives.

- 5) **Conflicts of Interest.** AOTA Board Members must remain loyal to AOTA’s mission and avoid any risk of conflicts of interest - real or perceived. Care and good judgment must always be exercised.
- 6) **Confidentiality.** AOTA Board Members must not post internally sensitive, proprietary, or confidential content.

**POLICY A.10**

Subject: **Official Publications**

Code: **RA Motion 3/81, 2003M54**

**PURPOSE:** To establish policy on designation of official publications.

**IT SHALL BE THE POLICY OF THE ASSOCIATION THAT:**

1. Official publications may be designated by the Board as long as the publications conform to the criteria identified in this policy.
2. The publications that are declared official publications must be representative of the membership and its concerns.
3. The publications designated as official must be available to all members.
4. Official publications shall be owned and published by the Association or under its auspices and control.

Effective: 3/81

Revised: 4/98, 6/03

BPPC Reviewed: 10/01, 1/02, 1/03, 1/04, 1/09, 7/15

Rescinded:

**POLICY A.11**

**Subject:**        **Reduced Membership Fees for OTs and OTAs 65 or Older and no Longer Employed**

**Code:**         **RA Resolution 575-81, RA Motion 4/95, 2003M54, 2006C389, 2011AprC2**

**PURPOSE:**    To establish policy on reduced membership fees for occupational therapists and occupational therapy assistants who are 65 or older and no longer employed.

**IT SHALL BE THE POLICY OF THE ASSOCIATION THAT:**

1.        With verification, an OT or OTA who is 65 or older, no longer employed, and a member is eligible for a reduced membership fee.
2.        The reduced membership fee shall be one-half of the annual fee for membership as set by the Assembly.
3.        This reduced membership fee is granted only for the entire annual year period. No partial reductions will be made.

Effective: 3/81

Revised: 4/95, 4/99, 6/03, 4/06, 4/11

BPPC Reviewed: 1986, 10/01, 1/03, 1/06, 1/11, 7/15

Rescinded:

**POLICY A.12**

**Subject: Association Strategic Planning Process**

**Code: RA Motion 4/88, 2003M54, 2004CO166**

**PURPOSE:** To establish policy regarding the Association planning process.

**IT SHALL BE THE POLICY OF THE ASSOCIATION THAT:**

1. The Association shall have a strategic planning process that integrates and links the Association Bylaws, policies, goals, objectives, budget, and activities. The process shall be based upon the Association's vision, mission, and values, including the development and implementation of a plan with operational objectives.
2. The Vice President shall be responsible for the development and implementation of a process that assures broad membership input into the development and ongoing review of the plan.
3. The Board is responsible for the prioritization, implementation, and ongoing review of the plan.
4. This Strategic Plan shall be reviewed annually by the Board.
5. The operational objectives shall link budget allocations to all activities that will ultimately accomplish the goals established in the plan.

Effective: 4/88

Revised: 3/92, 4/97, 4/00, 6/03, 11/04, 7/15

BPPC Reviewed: 10/01, 1/02, 1/03, 9/04, 1/11, 7/15

Rescinded:

**POLICY A.13**

Subject: **Conflict of Interest**

Code: **RA Motion 10/77, 2003M54, 2005C230, 2010AprC2**

**PURPOSE:** To state the Association's position regarding conflict of interest.

**IT SHALL BE THE POLICY OF THE ASSOCIATION THAT:**

1. A conflict of interest exists when an individual participates in Association business while having material personal, professional, business, financial, or volunteer responsibilities that could predispose or bias that individual to a particular view or goal. This could be in the execution of duties or in participation in debate or decision making.
2. All persons elected or appointed to carry out the business of the Association are responsible for their duties as defined in the Governance documents. At no time shall the personal, professional, business, financial, or volunteer responsibilities outside the Association take priority over the interests of the Association in the individual's execution of the duties of the position.
3. All persons elected or appointed to carry out the business of the Association must report a possible conflict of interest to the Association governance body of which they are a member.
4. If a real or perceived conflict of interest exists, the governance body of which he or she is a member will make a determination as to whether or not a conflict exists and what action, if any, should be taken in light of such a conflict.
5. If another person believes a real or perceived conflict of interest exists, he or she must request a judgment from the governance body of which he or she is a member as to whether a conflict exists.

Effective: 10/77

Revised: 1986, 4/97, 4/99, 6/03, 5/05, 4/10, 7/15

BPPC Reviewed: 10/01, 1/02, 1/03, 9/04, 1/05, 1/10, 7/15

Rescinded:

**Policy A.13 (cont'd)**  
**Conflict of Interest**

6. If a conflict is determined, the following options are available:
  - a. If the conflict is substantial (accepting employment) and can reasonably be Expected to be ongoing, the individual shall resign from one of the positions, or
  - b. If the conflict is related only to a particular issue under consideration, the individual shall declare that a conflict does or may exist and then recuse himself or herself from all discussion and voting on that issue, or
  - c. Such other action as is appropriate under the circumstances.
7. AOTA volunteer representatives shall have an ongoing duty to report promptly any potential and/or actual conflicts of interests as they arise to the body to which they are a member.
- i. Additional guidelines related to potential conflicts of interest may be defined in the Association's *Standard Operating Procedures*.

Effective: 10/77

Revised: 1986, 4/97, 4/99, 6/03, 5/05, 4/10, 7/15

BPPC Reviewed: 10/01, 1/02, 1/03, 9/04, 1/05, 1/10, 7/15

Rescinded:

**POLICY A.14**

Subject: **Antitrust Compliance**

Code: **RA Motion 4/83, 2003M54, 2007C1**

**PURPOSE:** To state the Association's position regarding compliance with federal and state trade regulations and antitrust laws.

**IT SHALL BE THE POLICY OF THE ASSOCIATION THAT:**

1. The Association shall comply with the letter and spirit of all federal and state trade regulations and antitrust laws.
2. Actions of the Association and its directors, officers, officials, members, or employees that violate these regulations and laws are unequivocally contrary to Association policy.
3. This policy shall include, but shall not be limited to, the Annual Business Meeting and meetings of the Board, Assembly, and all advisory and decision-making bodies.
4. Activities or discussions shall be avoided relative to:
  - a. Pricing of professional services
  - b. Encouraging boycotts
  - c. Fostering unfair trade practices
  - d. Promoting monopolization
  - e. Violating federal or state trade regulations and antitrust laws
5. Legal counsel shall, where appropriate, attend meetings of the Board, Assembly, and other bodies of the Association.
6. Any volunteer leader, member, or staff who participates in conduct determined by a two-thirds vote of the Board to be contrary to the Association antitrust compliance policy shall be subject to disciplinary measures up to, and including, termination and/or removal.

Effective: 4/83

Revised: 4/96, 4/97, 4/99, 6/03, 4/07, 7/15

BPPC Reviewed: 10/01, 1/02, 1/03, 1/04, 1/07, 1/09, 7/15

Rescinded:

**POLICY A.15**

Subject: **Editorial Policy for the *American Journal of Occupational Therapy* (AJOT®)**

Code: **RA Motion 7/94, 2007C17, 2012AprC8**

**PURPOSE:** To establish responsibilities for the *American Journal of Occupational Therapy* (AJOT®), which is the official journal of the Association.

**IT SHALL BE THE POLICY OF THE ASSOCIATION THAT:**

1. The AJOT® Editorial Board is responsible for AJOT® editorial policy.
2. The AJOT® Editor-in-Chief is responsible to the Board.
3. The AJOT® Editorial Board shall oversee AJOT®, concerning content and quality. This committee shall consist of the Editor-in-Chief and 6 to 8 Associate Editors. The Editorial Board shall communicate to the Board at its regular meeting or more often as needed via reports by the Editor-in-Chief.
4. Every 3 years, the Board shall interview, reaffirm or select a scholar to be the AJOT® Editor-in-Chief. The AJOT® Editorial Board shall recommend scholars for the Board's consideration.
5. The Executive Director is responsible to the Board for the fiscal management, technical editorial support, and publication and distribution of AJOT®.
6. The AJOT® Editor-in-Chief shall serve as an advisor to the Board when deemed desirable by the Board in order to transact business.
7. The AJOT® Editorial Board is responsible to the AJOT® Editor.

Effective: 7/94

Revised: 4/01, 11/03, 4/07, 4/12, 7/15

BPPC Reviewed: 10/01, 1/02, 1/03, 09/03, 1/07, 1/12, 7/15

Rescinded:



**POLICY A.16**

**Subject: Approval of New and Revised Standard Operating Procedures/Job Descriptions**

**Code: RA Motion 4/85**

**PURPOSE:** To establish policy for review and approval of new and revised standard operating procedures/job descriptions.

**IT SHALL BE THE POLICY OF THE ASSOCIATION THAT:**

1. All new or revised job descriptions and standard operating procedures of the Board and bodies of the Board shall be adopted by the Board following review and recommendations by the Bylaws, Policies, and Procedures Committee (BPPC).
2. All new or revised job descriptions and standard operating procedures of the Assembly and bodies of the Assembly shall be adopted by the Assembly following review and recommendation by the BPPC.
3. Revisions or amendments to existing job descriptions and standard operating procedures recommended by the originator shall be evaluated by BPPC for:
  - a. Consistency of language and format, and
  - b. Compatibility with Association Bylaws and Policies.

Effective: 4/85

Revised: 4/98, 4/01, 7/15

BPPC Reviewed: 10/01, 1/02, 1/10, 7/15

Rescinded:

**POLICY A.17**

Subject: **Official Documents of the Association**

Code: **RA Motion 7/94 (Replaces POLICY 1.30), 2003M54, 2007CO137, 2008CO103**

**PURPOSE:** To establish policy on Association official documents.

**IT SHALL BE THE POLICY OF THE ASSOCIATION THAT:**

1. Official documents are those approved by the membership or other official body of the Association in conformance with applicable law, the Articles of Incorporation, or the Bylaws for the use of the Association and its membership.
2. Official documents of the Association may be classified as governance and professional.
  - a. Governance: Documents evidencing the corporate status of the Association and required by law for carrying out the activities of the Association. Examples are the Articles of Incorporation, Bylaws, Policies and Procedures, official minutes of Assembly and Board meetings, and official minutes of the Annual Business Meeting.
  - b. Professional: Documents related to practice and professional standards of the occupational therapy profession. Examples are Standards of Practice, Standards of Continuing Competence, and the AOTA *Occupational Therapy Code of Ethics*.
3. Official documents, except confidential sections, shall be available to all members.

Effective: 7/94

Revised: 4/01, 6/03, 11/07, 11/08, 7/15

BPPC Reviewed: 10/01, 01/02, 1/03, 9/07, 1/08, 9/08, 7/15

Rescinded:

**POLICY A.18**

Subject: **Disposition of Official Documents**

Code: **RA Motion 4/85, 2003M111, 2004C84, 2005C248, 2009FebCS131**

**PURPOSE:** To establish policy on disposition of Association official documents.

**IT SHALL BE THE POLICY OF THE ASSOCIATION THAT:**

1. Official documents, except confidential sections, shall be published in an official publication of the Association.
2. Minutes of the Annual Business Meeting and a summary of Assembly meeting minutes shall be published in the *American Journal of Occupational Therapy (AJOT®)*, either in print or online. Complete copies, including disseminated materials related to the meeting (except confidential items), shall be available to members.
3. All official documents (except minutes, policies, standard operating procedures and job descriptions) shall be published in *The Reference Manual of the Official Documents of the American Occupational Therapy Association, Inc.*
4. A complete listing of official documents shall be published annually in the *AJOT®* archival issue, either in print or online.
5. Final disciplinary actions from the Ethics Commission (EC) shall be published in *AJOT®* and *OT Practice®*.
6. Final public disciplinary actions shall also be published on the Association Web site.

Effective: 4/85

Revised: 4/88, 5/91, 4/96, 4/99, 6/03, 5/05, 2/09, 7/15

BPPC Reviewed: 10/01, 1/02, 1/03, 1/04, 1/05, 1/09, 7/15

Rescinded:

**POLICY A.19**

Subject:       **Archiving of Official Documents**

Code:         **RA Motion 2004CO169**

**PURPOSE:** To establish policy on archiving Association official documents.

**IT SHALL BE THE POLICY OF THE ASSOCIATION THAT:**

1.       Official governance documents shall be archived at Association headquarters.
2.       A complete listing of official professional documents that have been archived will be published annually in the *AJOT*® archival issue and placed on the *AJOT*® online platform.

Effective: 11/04  
Revised: 11/04, 7/15  
BPPC Reviewed: 9/04, 1/10, 7/15  
Rescinded:

**POLICY A.20**

**Subject:** Board Certification and Specialty Certification

**Code:** RA Motion 4/87, 2003M54, 2004CO171, 2007C2

**PURPOSE:** To establish policy on recognizing occupational therapy practitioners who have achieved board certification or specialty certification in occupational therapy.

**IT SHALL BE THE POLICY OF THE ASSOCIATION THAT:**

1. The Association shall recognize occupational therapy practitioners who have achieved board certification or specialty certification in an identified area of occupational therapy practice consistent with criteria established by the Commission on Continuing Competence and Professional Development with the Board for Advanced and Specialty Certification (BASC) and implemented by the BASC.
2. The objective of such recognition is to:
  - a. Create a community of occupational therapy practitioners who share a commitment to ongoing continuing competence and professional development.
  - b. Provide credentials to those who have met the criteria for board certification or specialty certification through the demonstration of advanced or specialized knowledge, critical and ethical reasoning, and interpersonal and performance skills in an identified area of occupational therapy practice.
  - c. Enable consumers and other stakeholders to identify occupational therapy practitioners who have achieved board certification or specialty certification in an identified area of occupational therapy practice.

Effective: 4/87

Revised: 4/88, 7/90, 5/91, 6/03, 11/04, 4/07, 7/15, 10/18

BPPC Reviewed: 10/01, 1/02, 1/03, 9/04, 1/07, 1/12, 7/15

Rescinded:

**POLICY A.21**

Subject: **Confidentiality**

Code: **RA Motion 4/88, 2003M54**

**PURPOSE:** To establish policy on the Association's position on confidentiality and protection of member interests and privacy.

**IT SHALL BE THE POLICY OF THE ASSOCIATION THAT:**

1. The interests and privacy of the members shall be protected.
2. The integrity of the Association shall be protected.

Effective: 4/88

Revised: 4/00, 6/03, 7/15

BPPC Reviewed: 10/01, 1/02, 1/03, 1/11, 7/15

Rescinded:

**POLICY A.22**

Subject: **Scheduling of Official AOTA Meetings**

Code: **RA Motion 4/89, 2003M54**

**PURPOSE:** To establish policy assuring that major official Association meeting dates do not conflict with major religious holidays.

**IT SHALL BE THE POLICY OF THE ASSOCIATION THAT:**

The Annual Business Meeting and meetings of the Board and Assembly shall not be scheduled within one (1) week of any nationally recognized or observed religious holiday.

Effective: 11/89

Revised: 4/96, 4/99, 10/02, 6/03, 7/15

BPPC Reviewed: 10/01, 9/02, 1/03, 1/04, 1/09, 7/15

Rescinded:

## POLICY A.23

Subject: **Categories of Occupational Therapy Personnel and Students**

Code: **A Motion 4/95, 4/96, 1998M22, 1999M29, 2001C41, 2006C379**

**PURPOSE:** To establish policy assuring that Association documents use consistent terminology when referring to individuals who provide or support the delivery of occupational therapy services.

### IT SHALL BE THE POLICY OF THE ASSOCIATION THAT:

The following terms are used as defined herein in all Association documents and publications:

1. **Occupational Therapist (OT):** Any individual initially certified to practice as an OT or licensed or regulated by a state, commonwealth, district, or territory of the United States to practice as an OT and who has not had that certification, license, or regulation revoked due to disciplinary action.
2. **Occupational Therapy Assistant (OTA):** Any individual initially certified to practice as an OTA or licensed or regulated by a state, commonwealth, district, or territory of the United States to practice as an OTA and who has not had that certification, license, or regulation revoked due to disciplinary action.
3. **Occupational Therapy Student (OTS):** Any individual who is enrolled in an occupational therapy educational program that is accredited, approved, or pending approval or accreditation by ACOTE®.
4. **Occupational Therapy Assistant Student (OTAS):** An individual who is enrolled in an occupational therapy assistant educational program that is accredited, approved, or pending approval or accreditation by ACOTE®.
5. **Occupational Therapy Practitioner:** An individual initially certified to practice as an OT or OTA or licensed or regulated by a state, district, commonwealth, or territory of the United States to practice as an occupational therapist or occupational therapy assistant and who has not had that certification, license, or regulation revoked due to disciplinary action.

Effective: Effective: 7/94

Revised: 4/95, 4/96, 4/98, 4/99, 4/01, 4/06, 7/15

BPPC Reviewed: 10/01, 1/02, 1/03, 1/06, 1/11, 7/15

Rescinded:



**POLICY A.23 (cont'd)**

**Categories of Occupational Therapy Personnel**

6. **Aide:** A person who is not licensed or regulated and who provides supportive services to OTs and OTAs. An aide shall function under the guidance and responsibility of the licensed or regulated occupational therapist and may be supervised by the occupational therapist or an occupational therapy assistant for specifically selected routine tasks for which the aide has been trained and has demonstrated competence. The aide is not a primary service provider of occupational therapy in a practice setting and does not provide skilled occupational therapy services.

Effective: Effective: 7/94

Revised: 4/95, 4/96, 4/98, 4/99, 4/01, 4/06, 7/15

BPPC Reviewed: 10/01, 1/02, 1/03, 1/06, 1/11, 7/15

Rescinded:

**POLICY A.24**

Subject:       **Election Campaign Policy**

Code:         **RA Motion 4/95, 2003M54**

**PURPOSE:**   To establish policy regarding election campaigning.

**IT SHALL BE THE POLICY OF THE ASSOCIATION THAT:**

Candidates running for Association elected positions have the right to campaign for office within guidelines established by the Volunteer Leadership Development Committee (VLDC).

Effective: 4/95

Revised: 4/01, 6/03, 1/13

BPPC Reviewed: 10/01, 1/02, 1/03, 1/04, 1/09, 1/13, 7/15

Rescinded:

**POLICY A.25**

Subject:       **Association Ad Hoc Committees**

Code:         **RA Motion 2002M24, 2003M55, 2007C4, 2011NovC41**

**PURPOSE:**   To establish policy defining Ad Hoc Committees.

**IT SHALL BE THE POLICY OF THE ASSOCIATION THAT:**

1.       All committees not identified in the Bylaws will be ad hoc.
2.       An ad hoc committee has the following characteristics:
  - a.   Appointed committee members
  - b.   Charged with a specific task
  - c.   Shall not duplicate the task of an existing body
  - d.   Present a final report to the appropriate body by a designated date
  - e.   Dissolve after presentation of final report
3.       All ad hoc committees shall be established by the Board or Assembly to consider, investigate, or recommend action on certain matters or subjects.
4.       Appointments to ad hoc committees shall utilize all the contemporary tools available through the Association.

Effective Date: 5/02

Revised: 6/03, 4/07, 11/11, 7/15

Reviewed BPPC: 1/03, 1/04, 1/07, 9/11, 7/15

Rescinded:

**POLICY A.26**

Subject: **Emergency**

Code: **RA Motion 2002M39, 2003M54, 2005CO296**

**PURPOSE:** To establish policy for emergencies.

**IT SHALL BE THE POLICY OF THE ASSOCIATION THAT:**

1. An emergency is an event or series of events that would alter the Association's ability to effectively conduct business for more than 2 business days. An emergency may result from:
  - a. Natural disasters
  - b. Manmade disaster
  - c. Damage to Association headquarters that interferes with the ability to conduct business
  - d. Loss of a majority of Association officers and officials due to resignation, removal, or death
  - e. Federal, state, or local governmental action taken in response to civil unrest or international events that would interfere with Association activities
2. A declaration of an emergency may be made by one of the following: the Association Executive Director (ED), President, or Vice President; or in the absence of the forenamed individuals, a majority of the senior staff (e.g., the Chief Officers). The declaration is to respond to the conditions referenced in items one through five above.
3. Declaration of an emergency shall be in writing signed by named official(s) and provide for the suspension of Policy 2.1, Budgetary Process, for a period of 90 days or until a Board Meeting can be convened to address the emergency. In the event of an above referenced emergency the ED or senior staff shall be permitted to expend up to one (1) month operating expenses based upon current approved budget for the Association. These emergency funds shall be used exclusively to protect volunteers; staff; Association plant, property, and equipment; and the reputation and standing of the profession.
4. The guiding principle in the event of an emergency shall be preservation of life, protection of the Association's assets, and the return to operational status as soon as possible.

Effective Date: 5/02

Revised: 6/03, 11/05, 7/15

BPPC Reviewed: 1/03, 1/04, 9/05, 1/09, 7/15

Rescinded:

**POLICY A.27**

Subject: **Oath of Office**

Code: **RA Motion 2004C77, 2004CO170, 2010AprC6**

**PURPOSE:** To be used as a commitment statement made by all elected or appointed volunteer sector individuals as they assume a governing role in the Association.

**IT SHALL BE THE POLICY OF THE ASSOCIATION THAT:**

1. An oath of office shall be used to swear in officers, officials, other leaders and members as they assume their official positions in the Association.
2. The oath shall be administered in addition to completion of the Consent to Serve and Conflict of Interest statements which must be completed prior to assuming office.
3. The oath of office shall be administered at the first meeting of the body to which the officer, official, leader or member has been elected or appointed. The oath may be administered prior to the assumption of office. The oath is administered by the presiding official or his or her designee and noted in the official minutes.
4. The Oath of Office is:  
I, (name), willingly accept the duties and responsibilities of the office to which I have been elected or appointed. I agree to perform those duties to the best of my abilities. I further declare that I will uphold the Articles of Incorporation, the Bylaws, the Policies, and the AOTA *Occupational Therapy Code of Ethics* for the good of the organization and its members.

Effective: 5/04

Revised: 11/04, 4/10, 7/15

Reviewed BPPC: 9/04, 1/10, 7/15

Rescinded:

**POLICY A.28**

Subject: **Consent To Serve**

Code: **RA Motion 2006C314**

**PURPOSE:** To ensure that elected or appointed Association volunteers are aware of the critical documents of the Association and consent to serve in the positions to which they are elected or appointed.

**IT SHALL BE THE POLICY OF THE ASSOCIATION THAT:**

1. Any individual who is elected or appointed to an Association position identified in the Bylaws (including members of committees and commissions) will sign the Consent to Serve Form.
2. It shall be the responsibility of the presiding official of the appropriate body, or his or her designee, to obtain these signed forms.
3. Signed forms must be completed prior to the start of the term of office.
4. These forms will be housed at the Association headquarters with the Association staff liaison.

Effective: 4/06  
Revised: 7/15  
BPPC Reviewed: 1/11, 7/15  
Rescinded:

**POLICY A.29**

**Subject:**        **Language Related to OT and OTA Roles and Responsibilities in Association Publications**

**Code:**         **RA Motion 2006C412**

**PURPOSE:**    To ensure consistency in the use of language related to occupational therapist (OT) and occupational therapy assistant (OTA) roles and responsibilities in Association publications.

**IT SHALL BE THE POLICY OF THE ASSOCIATION THAT:**

1.        The roles and responsibilities of the OT and OTA shall be considered in Association publications and when appropriate, role distinctions shall be consistently clarified with the use of the most current version of: *Guidelines for Supervision, Roles and Responsibilities During the Delivery of Occupational Therapy Services*; *Standards of Practice for Occupational Therapy*; *Guidelines: Occupational Therapy Practice Framework: Domain and Process, 3<sup>rd</sup> edition*; *Standards for Continuing Competence*; the *Occupational Therapy Code of Ethics*; and any other appropriate and official document.
2.        Author and reviewer guidelines for Association publications shall use language regarding OT and OTA roles that include the role distinctions clarified in the documents listed in item 1 of this policy (above).
3.        The term *occupational therapy practitioner* shall be used when it refers to both OTs and OTAs and their roles and responsibilities noted in the documents listed in number 1. When referring to the distinct and separate roles and responsibilities of OTs and OTAs, the terms, *OT* and *OTA* shall be used.

Effective: 11/06

Revised: 7/15

BPPC Reviewed: 9/06, 1/11, 7/15

Rescinded:

**POLICY A.30**

Subject: **Board Authority**

Code: **BDM3-62406**

**PURPOSE:** To recognize the authority of the Board.

**IT SHALL BE THE POLICY OF THE ASSOCIATION THAT:**

The Board identifies and assigns roles and responsibilities for individual Board members. These roles derive from the authority of the Board as the body that governs the affairs of the Association in accordance with statutory, corporate, and Bylaws powers. Thus, Board practices must recognize that it is the Board of Directors, not individual Board members, who exercise authority and control over Association matters. Once the Board has made a decision, it shall act as a single voice, united in its decision.

Effective: 6/06  
Revised:  
BPPC Reviewed: 1/09, 7/15  
Rescinded:



**POLICY A.31**

Subject:       **Association Executive Director Accountability**

Code:         **BDM7-62406**

**PURPOSE:**   To define the accountability of the Association Executive Director to the Board.

**IT SHALL BE THE POLICY OF THE ASSOCIATION THAT:**

1.       The Association Executive Director (ED) is accountable to the Board as a body and not its individual members.
2.       The President acts as the liaison between the Board and the ED.

Effective: 6/06  
Revised: 1/09, 7/15  
BPPC Reviewed: 7/15  
Rescinded:

**POLICY A.32**

Subject: **Delegation to the Association Executive Director**

Code: **BDM5-62406**

**PURPOSE:** The delegation of Board Authority.

**IT SHALL BE THE POLICY OF THE ASSOCIATION THAT:**

All Board authority is delegated to staff through the Association Executive Director (ED). The ED is accountable to the Board for organizational performance in support of the Association's mission and strategic directions.

Effective: 6/06  
Revised: 7/15  
BPPC Reviewed: 1/09, 7/15  
Rescinded:

**POLICY A.33**

Subject: **Emergency Association Executive Director Succession**

Code: **BDM6-62406**

**PURPOSE:** To establish a policy for emergency Association Executive Director succession.

**IT SHALL BE THE POLICY OF THE ASSOCIATION THAT:**

The Association Executive Director (ED) shall have two other chief officers familiar with Board and Association management issues and processes in order to protect the Association in the event of a sudden loss of the ED's services.

Effective: 6/06  
Revised: 7/15  
BPPC Reviewed: 1/09, 7/15  
Rescinded:

**Policy A.6 (cont'd)**  
**Open Meetings**

2. The agenda of a regular meeting of the Board, Assembly, and the Annual Business Meeting shall be published in an official publication of the Association at least 2 weeks prior to the meeting. The agenda shall contain the meeting starting time and location (including the address with building and room) as well as a statement indicating that it is an open meeting.

Effective: 5/78

Revised: 4/89, 4/99, 5/02, 6/03, 11/03, 4/07, 11/07, 2/09, 2/17

BPPC Reviewed: 10/01, 1/02, 1/03, 9/03, 1/07, 9/07, 1/09, 7/15, 1/17

Rescinded:

## Policy A.34

### **Subject: Board Member Applying for AOTA Staff Positions**

**Code:** BoD 01-04022025

**Purpose:** To establish policy on Board members applying for AOTA staff positions

#### **IT SHALL BE THE POLICY OF THE ASSOCIATION THAT:**

1. Members currently serving on the Board of Directors, including positions such as Director, Secretary, Treasurer, Vice President, President, President-Elect, Representative Assembly Speaker, Chairperson of the Diversity, Equity, Inclusion, Justice, Access, and Belonging Committee, as well as any other voting or non-voting Board members, are not eligible to apply for a staff position within the Association.
2. Any Board member who wishes to apply for a staff position within the Association must first resign from their role on the Board of Directors.

## Policy A.35

### Subject: Board Travel and Reimbursement Policy

**Code:** BoD 01-04022025

**Purpose:** To establish policy on Board Travel

The Board of Directors of the American Occupational Therapy Association (“AOTA”) recognizes that Board members and officers (hereinafter, “Directors”) may be required to travel or incur other expenses from time to time to conduct Association business in furtherance of the Association’s nonprofit mission. This policy specifies which travel and other expenses related to AOTA business are reimbursable and sets forth the procedure for reimbursement. This policy ensures transparency and accountability in managing travel expenses associated with board service while also maintaining fiscal responsibility by requiring approval and budget considerations for additional trips and guest invitations.

It is the policy of AOTA to reimburse only reasonable and necessary expenses actually incurred by Directors. When incurring travel and lodging expenses, AOTA expects Directors to:

- Exercise discretion and good business judgment with respect to those expenses.
- Be cost-conscious and spend the Association's money as carefully and judiciously as the individual would spend their own funds.
- Report expenses, supported by required documentation, were spent.

1. **Commercial Travel.** AOTA shall reimburse all Directors for necessary and reasonable travel expenses incurred in connection with travel to and from in-person Board meetings and the Annual Conference and Expo (AOTA INSPIRE). Reasonable and necessary travel expenses shall include (a) one (1) round trip, coach class airline or train ticket, (b) one (1) checked bag, not to exceed the carrier’s maximum weight or dimensions, (c) taxi or ride share expenses to and from the airport or train station, and (d) airport parking (economy lot) or train station parking. With prior approval and for reasonable and necessary reasons, AOTA may authorize pre-approved reimbursement for a rental car as an alternative to taxi or ride-share services. All other incidental commercial travel expenses, such as in-flight entertainment or meals, shall be borne by the Director.

2. **Personal Vehicles.** When reasonable and financially prudent, Directors may choose to travel to and from AOTA Board meetings or the Annual Conference and Expo (AOTA INSPIRE) using their personal vehicle. In such cases, AOTA will reimburse mileage at the rate specified in the AOTA Travel Reimbursement Guidelines for Volunteers.

3. **Lodging.** AOTA shall secure lodging for each Director in connection with in-person Board meetings and the Annual Conference and Expo (AOTA INSPIRE). It is expected that Directors will stay at the AOTA-contracted hotel. Covered lodging expenses include the nightly room rate for a standard

room, taxes, and fees for the duration of the AOTA event. Directors may also seek reimbursement for reasonable tips for bellhop and house cleaning services. Directors are responsible for any upgrades, additional nights, or other miscellaneous fees such as room service, mini bar purchases, or other non-covered expenses.

4. **Meals.** AOTA provides a per diem for meals during approved travel, based on a designated rate updated periodically to reflect budget, inflation, and other factors. The per diem will be adjusted to reflect meals provided at AOTA-sponsored events.

5. **Reimbursement for the President.** Consistent with Sections 1-4, AOTA will reimburse the President for necessary and reasonable travel expenses for in-person Board meetings, the Annual Conference and Expo (AOTA INSPIRE), and two additional AOTA business-related events annually. The President may invite outside guests to Board meetings, when necessary, provided funds are available in the Board's travel budget.

6. **Approval Process for Additional Trips.** Directors must obtain approval from the President and Chief Executive Officer (CEO) before committing to any AOTA business travel beyond the approved policy. The President must seek approval from the Executive Officers and CEO for additional travel beyond the approved policy. Reimbursement is subject to budget availability, and unauthorized travel will not be reimbursed.

## 7. Reimbursement Procedure.

A. **Expense Report.** Expenses will only be reimbursed with a completed Expense Report, submitted within 60 days for travel-related costs. The report must include:

- Name of the requester.
- For travel: trip date, destination, purpose, and association-related activities.
- For business entertainment: date, location, expense details, attendee names/affiliations, and business purpose.
- An itemized list of all reimbursable expenses

B. **Receipts.** No expenses over \$25 will be reimbursed without a receipt showing the vendor's name, service description (if not obvious), date, and total cost, including tips if applicable. If a receipt is unavailable, alternative proof such as a credit card statement, canceled check, or a written explanation may be submitted.

## 8. Lavish Expenses.

The Association maintains a strict policy that expenses in any category that could be perceived as lavish or excessive will not be reimbursed, as such expenses are inappropriate for reimbursement by a nonprofit organization.

**POLICY B.1**

Subject: **Budgetary Process**

Code: **RA Motion 4/77, 4/95, 2003M54, 2008C10**

**PURPOSE:** To establish policy regarding the Association budgetary process.

**IT SHALL BE THE POLICY OF THE ASSOCIATION THAT:**

1. The Association shall provide the necessary financial support for its activities through the budgetary process established by the Board in collaboration with the Association Executive Director (ED).
2. Approved activities shall be funded according to priorities established by the Board consistent with the Association's strategic plan.
3. Activities not budgeted in the current fiscal year that require expenditure of Association funds must come through the Treasurer for review and submission to the Board for approval. Projects that address the strategic plan and require a budget of \$50,000 or less may be approved by the ED.

Effective: 4/77

Revised: 4/95, 4/01, 6/03, 4/08, 7/15

BPPC Reviewed: 10/01, 1/02, 1/03, 1/08, 7/15

Rescinded:



**POLICY B.2**

**Subject: Contribution of Fees to the American Occupational Therapy Foundation (AOTF®)**

**Code: RA Resolution 563-80 (Amends Resolution 505-77, Policy 2), RA Motion 2003M54**

**PURPOSE:** To establish policy regarding the Association membership fee contribution to AOTF®.

**IT SHALL BE THE POLICY OF THE ASSOCIATION THAT:**

1. Two percent (2%) of each member's annual Association membership fees shall be designated as a contribution to the AOTF® to support their mission as designated by the Board.
2. There shall be a statement on the Association annual membership renewal and new member application that two percent (2%) of each member's fee is designated as a contribution to the AOTF®.
3. The Association shall serve as a receiving agent for such contributions and the amounts of such contributions will be transferred to AOTF® on a periodic basis.

Effective: 4/80

Revised: 4/80, 4/98, 4/01, 6/03, 7/15

BPPC Reviewed: 10/01, 1/02, 1/03, 1/10, 7/15

Rescinded:

**POLICY B.3**

Subject: **Travel and *Per Diem* Reimbursement for Official Bodies of the Association**

Code: **RA Motion 4/86 and 4/95 (Supersedes POLICY 2.3, POLICY 2.4, and POLICY 2.5 of 1978), 2003M54, 2005C252**

**PURPOSE:** To establish policy regarding travel and *per diem* reimbursement for Association bodies.

**IT SHALL BE THE POLICY OF THE ASSOCIATION THAT:**

1. Travel and per diem reimbursement shall be authorized for Association bodies, within the budgetary limitations of the Association, for meetings necessary to conduct the business of the Association as authorized in the Bylaws.
2. The *per diem* rate shall be determined by the Treasurer in collaboration with the Chief Financial Officer (CFO) of the Association and approved by the Board.

Effective: 5/78

Revised: 4/86, 4/95, 4/96, 4/97, 4/01, 6/03, 5/05, 7/15

BPPC Reviewed: 10/01, 1/02, 1/03, 1/05, 1/10, 7/15

Rescinded:

**POLICY B.4**

**Subject:       Operation and Composition of Association Bodies**

**Code:         RA Motion 2003M54, 2008C11, 2008CO90, 2011NovC42**

**PURPOSE:**   To establish policy identifying the Association's position on Association body composition.

**IT SHALL BE THE POLICY OF THE ASSOCIATION THAT:**

1.     Association bodies shall address charges as directed and operate within their allocated budget.
2.     An individual appointing members to an Association body shall consider inclusion of occupational therapists or occupational therapy assistants, the ability/skills of the candidate to perform the position, clinical experience, diversity, and geographic representation needed to provide inclusive membership representation to address the assigned charge.
3.     An individual appointing members to an Association body shall also utilize all the contemporary tools available through the Association.

Effective: 4/80

Revised: 4/83, 4/85, 4/88, 6/93, 4/95, 4/98, 4/99, 4/01, 4/80, 4/83, 4/85, 4/88, 6/93, 4/95, 6/03, 4/08, 11/08, 11/11

BPPC Reviewed: 10/01, 1/02, 1/03, 1/08, 9/08, 9/11, 7/15

Rescinded:

**POLICY B.5**

**Subject: Compensation for Writing Association Documents**

**Code: RA Motion 7/94, 2003M54**

**PURPOSE:** To establish policy regarding compensation for writing Association documents.

**IT SHALL BE THE POLICY OF THE ASSOCIATION THAT**

Volunteers may be compensated for writing Association documents if:

- a. The individual does not serve on the Association body that is responsible for the development and production of the document.
- b. The personal or financial gain of the individual does not take priority over the best interests of the Association in the writing of the document.
- c. Any compensation paid does not violate Article II, Section 1. of the Association Bylaws (Non-inurement).

The Association reserves the right to retain or publish the document, and reserves all copyrights pursuant to Policy 1.5-R.

The Association Executive Director shall be responsible for administering this policy and determining whether compensation is appropriate.

Effective: 7/94

Revised: 4/97, 4/01, 5/02, 6/03, 7/15

BPPC Reviewed: 1/02, 1/03, 1/10, 7/15

Rescinded:

**POLICY B.6**

**Subject:** Net Assets (Formerly General Reserve Fund)

**Code:** RA Motion 4/95, 2003M54, 2004C59

**PURPOSE:** To establish policy establishing a minimum reserve level of liquid assets to equal estimated resources needed for the Association to operate in the event of an emergency.

**IT SHALL BE THE POLICY OF THE ASSOCIATION THAT:**

1. The Association shall maintain reserve funds in cash, cash equivalents, other short-term assets, and investments to meet its obligations in the event of an emergency.
2. The reserve level of these funds shall be maintained at between 15% and 25% of the budgeted annual expenses of the Association.
3. The reserve level will be reviewed at the end of each fiscal year to ensure compliance.
4. The Treasurer, representing the Board, will be notified by the Association Executive Director if the level of reserve does not conform to established criteria.
5. The Treasurer will recommend a plan to the Board for managing the critical period of emergency recovery.

Effective: 4/95

Revised: 4/98, 6/03, 5/04 7/15

BPPC Reviewed: 10/01, 1/02, 1/03, 1/04, 1/10, 7/15

Rescinded:

**POLICY B.7**

Subject:       **Compensation and Benefits**

Code:         **BDM4-62406**

**PURPOSE:**   To ensure the fiscal integrity of the Association.

**IT SHALL BE THE POLICY OF THE ASSOCIATION THAT:**

The Association Executive Director will not cause or allow jeopardy to the fiscal integrity of the Association with respect to employment, compensation, and benefits to employees, consultants, contractual workers, and volunteers.

Effective: 6/06  
Revised:  
BPPC Reviewed: 1/09, 7/15  
Rescinded:

**POLICY B.8**

Subject: **Financial Responsibility of the Executive Director**

Code: **BDM8-62406**

**PURPOSE:** To establish a policy relating to the financial responsibility of the Association Executive Director.

**IT SHALL BE THE POLICY OF THE ASSOCIATION THAT:**

1. The Association Executive Director (ED) shall ensure that the organization is operated in a manner that is financially prudent.
2. The ED operates under the guidance of Board Priorities and the current strategic plan, approved by the Board, within the parameters of the annual budget.
3. The ED shall report on a regular basis to the Board on the financial results of operations.
4. Additionally, the ED responsibilities include:
  - a. Maintaining adequate internal accounting controls that ensure integrity of financial reporting.
  - b. Preparing financial reporting in accordance with Generally Accepted Accounting Principles (GAAP).
  - c. Having adequate risk management policies and practices are in place and maintaining appropriate levels of insurance to protect the organization, Board directors officers, and staff.
  - d. Having access to investment income arising from cash interest and dividends which may be withdrawn on an annual basis from the portfolio to support operations. Withdrawals from the portfolio, other than interest and dividends, shall be limited to 5% of the current operating budget. Amounts over this amount shall not occur without approval of the Board.

Effective: 6/06

Revised: 7/15

BPPC Reviewed: 1/09, 7/15

Rescinded:

**POLICY B.8 (cont'd)**

**Financial Responsibility of the Executive Director**

- e. Maintaining liquidity sufficient to meet current obligations in a timely manner. The ED is authorized to access credit to support current operational needs or those identified in the current year budget.
- f. Filing required governmental reports, which shall be accurate and timely, and making related tax payments as required.

Effective: 6/06  
Revised: 7/15  
BPPC Reviewed: 1/09, 7/15  
Rescinded:



**POLICY C.1**

Subject: **Grant Proposal Support**

Code: **RA Motion 4/80, 4/96, 2002M30**

**PURPOSE:** To identify policy on Association financial or non-financial support of grant proposals.

**IT SHALL BE THE POLICY OF THE ASSOCIATION THAT:**

1. Upon request, financial or non-financial support may be provided for grant proposals that satisfy criteria delineated in this policy.
2. Grant proposals that receive support shall be consistent with current Association priorities as established by the Board.
3. Grant proposals that receive support shall demonstrate substantial evidence of furthering the goals and objectives of the Association.

Effective: 4/80

Revised: 4/96, 5/02, 7/15

BPPC Reviewed: 10/01, 1/02, 1/04, 1/09, 7/15

Rescinded:

**POLICY C.2**

Subject: **Collective Bargaining**

Code: **RA Motion 4/83, 2003M54**

**PURPOSE:** To state the Association's position on collective bargaining of members.

**IT SHALL BE THE POLICY OF THE ASSOCIATION THAT:**

1. Occupational therapy practitioners have the individual right to participate in the process of collective bargaining under existing state and federal labor relations laws.
2. It is not a violation of the AOTA *Occupational Therapy Code of Ethics* for a member who belongs to a collective bargaining unit to participate in a strike called by that collective bargaining unit.
3. The Association shall not engage in collective bargaining on behalf of its members.

Effective: 4/83

Revised: 4/97, 4/99, 5/02, 6/03

BPPC Reviewed: 10/01, 1/03, 1/04, 1/09, 7/15

Rescinded:

**POLICY C.3**

Subject: **International Involvement**

Code: **RA Motion 4/90, 2003M54**

**PURPOSE:** To state the Association's position regarding international occupational therapy activities.

**IT SHALL BE THE POLICY OF THE ASSOCIATION THAT:**

The Association supports the development and expansion of occupational therapy activities in the international arena.

Effective: 4/90

Revised: 7/94, 4/00, 6/03

BPPC Reviewed: 10/01, 1/02, 1/03, 1/10, 7/15

Rescinded:

**POLICY C.4**

**Subject: Endorsements, Partnerships, or Sponsorships**

**Code: RA Motion 4/98**

**PURPOSE:** To establish policy on Association endorsements, partnerships, or sponsorships.

**IT SHALL BE THE POLICY OF THE ASSOCIATION THAT:**

1. The Association may enter into endorsement, partnership, or sponsorship arrangements if they:
  - a. Provide a tangible benefit to the Association and its members.
  - b. Increase desirable visibility of the Association and the profession.
  - c. Are consistent with the mission statement and strategic plan of the Association.
  - d. Do not risk the assets or integrity of the Association and/or the profession and do not impose unreasonable management demands.
2. Arrangements are time limited and will be reconsidered annually.

Effective: 4/98

Revised: 7/15

BPPC Reviewed: 10/01, 01/02, 1/04, 1/09, 7/15

Rescinded:

**POLICY C.5**

**Subject: Acknowledgement to Employers of Contributions by Association Leaders**

**Code: RA Motion 2004CO167, 2008C31**

**PURPOSE:** To raise the visibility of volunteer leaders' contributions to the Association with their employers.

**IT SHALL BE THE POLICY OF THE ASSOCIATION THAT:**

Elected or appointed volunteer leaders may request that a letter to be sent to their employer to express the Association's appreciation for service to the profession.

Effective: 11/04  
Revised: 11/04, 4/08, 7/15  
Reviewed BPPC: 9/04, 1/08, 7/15  
Rescinded:

**POLICY D.1**

Subject: **Official Positions of the Association**

Code: **RA Motion 4/77, 4/95, 2003M54, 2010AprC7**

**PURPOSE:** To establish policy regarding official positions of the Association.

**IT SHALL BE THE POLICY OF THE ASSOCIATION THAT:**

1. The Association shall identify its position regarding the current trends in practice, education, and research as related to the health, economic, social, and legislative environments.
2. Proposed policies for implementation of an official position related to professional standards and practice shall be brought to the Assembly for consideration and action.
3. Except as provided in item 2. of this policy, proposed policies for implementation of official positions shall be brought to the Board for consideration and action.
4. Members are encouraged to submit documents for consideration as official positions of the Association.
5. Adopted positions should be used by members and Association staff when representing the Association.
6. Official positions must be kept current. The procedure for review and maintenance of current positions shall be contained in the Association's *Governance Manual*.
7. All adopted official positions shall be published in an official publication.
8. Members shall refer to Policy 1.30-R, Official Documents of the Association, for clarification of *official documents*.

Effective: 4/77

Revised: 4/95, 6/03, 4/10, 7/15

BPPC Reviewed: 10/01, 1/02, 1/03, 1/10, 7/15

Rescinded:

**POLICY D.2**

Subject: **Basic Rights for Human Beings**

Code: **RA Resolutions 475-76 and 463-75, RA Motion 2003M54, 2008C8**

**PURPOSE:** To state the Association's position regarding basic human rights.

**IT SHALL BE THE POLICY OF THE ASSOCIATION THAT:**

1. The Association supports the belief that each human being has the capacity for intrinsic self-directedness and decision making.
2. Every individual is entitled to maximum opportunity to develop and utilize his or her abilities to participate in occupations.
3. Every individual shall share the same basic human rights.
4. The Association through its members, bodies, officers, officials, and staff shall take actions to support the above stated beliefs.

Effective: 10/76

Revised: 4/78, 5/91, 7/94, 6/03, 4/08, 7/15

BPPC Reviewed: 10/01, 1/02, 1/03, 1/08, 7/15

Rescinded:

**POLICY D.3**

Subject: **No Smoking**

Code: **RA Resolution 619-86, RA Motion 2003M54**

**PURPOSE:** To establish policy regarding smoking.

**IT SHALL BE THE POLICY OF THE ASSOCIATION THAT:**

1. There shall be no smoking at official gatherings of the Association, except in designated areas.
2. The Association makes its pro-health position known by identifying its policy in printed programs, meeting environments, and registration areas for official gatherings.
3. The Association encourages members to accept responsibility for supporting and implementing this policy.

Effective: 4/86

Revised: 4/99, 6/03, 7/15

BPPC Reviewed: 10/01, 1/02, 1/03, 1/04, 1/09, 7/15

Rescinded:



## **POLICY D.4**

Subject: **Diverse and Inclusive Membership**

Code: **RA Motion 2003M107, 2006C391, 2011AprC4**

**PURPOSE:** To state the Association's position that a diverse and inclusive membership is promoted and encouraged in Association membership, activities, documentation, publications, and presentations sponsored by the Association.

### **IT SHALL BE THE POLICY OF THE ASSOCIATION THAT:**

1. The Association shall seek a diverse and inclusive membership.
2. The Association shall promote full participation in Association activities regardless of economic status, age, ethnicity, race, geography, disability, marital status, sexual orientation, gender, gender identification, religion, culture and political affiliation within the occupational therapy profession.
3. Association documents and publications will include multicultural content and gender-neutral references as appropriate.
  - a. The Association shall not discriminate on the basis of economic status, age, ethnicity, race, geography, disability, marital status, sexual orientation, gender, gender identification, religion, culture and political affiliation, or any other basis proscribed by applicable law.
  - b. Authors and editors of Association publications and presenters at events, shall be advised to the use of gender-neutral language and multi-culturally appropriate material.
  - c. The term *chairperson* shall be used in place of *chairman* throughout the Association and Association documents.
4. There will be a waiver of membership fees for occupational therapy practitioners who have a permanent disability and are no longer employed due to the permanent disability.
  - a. To qualify for the waiver, the OT or OTA must:
    - i. have been a member at the onset of the present disability, and
    - ii. provide satisfactory verification of the permanent disability and unemployed status by such means as the Social Security Administration, Veterans Administration, workers' compensation, or a qualified physician.

**POLICY D.4 (cont'd)**  
**Diverse and Inclusive Membership**

- b. The waiver of membership fees is granted only at the time of membership renewal.
  - c. Membership waiver shall include full member benefits at no cost.
- 5. Individuals with disabilities will have access to events, activities, and services sponsored by the Association.
  - a. The Association shall encourage the participation of individuals with disabilities at Association sponsored events.
  - b. The Association shall use facilities for events and activities that are accessible to and usable by individuals with disabilities, following the Americans with Disabilities Act (ADA) requirements.
  - c. The Association shall use information technology to communicate and provide services for events and activities that are accessible to and usable by individuals with disabilities.
  - d. The Association shall provide information to participants at events and activities regarding available resources to assist individuals with disabilities to participate whenever reasonably feasible.
  - e. Upon request, whenever feasible and within the Association's control, the Association will provide reasonable accommodations to persons with disabilities to assist them in arranging to participate in Association sponsored events and activities.
  - f. The Association shall provide written notification to participants regarding their opportunity to request auxiliary aids and services in advance of the Association sponsored event or activity.
  - g. The intent of this policy shall be communicated in appropriate promotional materials for Association sponsored events and activities and communicated on the Association Web site.

Effective: 6/03

Revised: 4/06, 4/11, 7/15

Reviewed BPPC: 1/03, 1/06, 1/11, 7/15

Rescinded: