

BY-LAWS
OF
IDAHO OCCUPATIONAL THERAPY ASSOCIATION

Documentation of changes

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Article I.

Definitions

Section 1.01 Name. The organization shall be called the Idaho Occupational Therapy Association, Incorporated and hereinafter shall be referred to as the IOTA or the Association, an Idaho nonprofit corporation.

Section 1.02 Affiliation. The IOTA shall collaborate and be affiliated with the American Occupational Therapy Association, Incorporated, hereinafter referred to as the AOTA, in compliance with the rules and regulations set forth by the Bylaws of the AOTA.

Article II.

Purpose of the Organization

Section 2.01 Mission Statement. The IOTA shall support and advance the profession of Occupational Therapy through professional development, public awareness, and political advocacy. The IOTA shall support our occupational therapy practitioners, both current and future, in their learning and professional growth to ultimately promote the highest level of health, well-being and quality of life to all people, populations and communities in the state of Idaho through participation in meaningful occupations.

Article III.

Principal Office

Section 3.01 Location. The Principal office for the transaction of business of the association is located in the state of Idaho. The Executive Board may at any time change the location of the principal office. The principal office shall be the designated address of the association post office box.

Article IV.

Members

Section 4.01. Membership Categories. Membership shall be divided into two (2) categories:

- A. Practitioners
- B. Students

Section 4.02. Membership Qualifications.

- A. Practitioners: OT and OTA Practitioners licensed and practicing within the state of Idaho.
- B. Student: Students who express an interest in occupational therapy as a career or who are taking pre-occupational therapy or occupational therapy coursework.

Section 4.03 Membership Rights and Privileges.

- A. Practitioners:
 - a. May attend and participate in all meetings of the IOTA, including Executive Board meetings, the annual business meeting, district meetings, or any other meetings organized by the IOTA.
 - b. May vote at open business meetings, such as the annual business meeting, on items pertaining to the IOTA including but not limited to amending bylaws, ratifying the budget and election of officers.
 - c. May be eligible to hold any office and serve on any committee subject to the qualifications established for the particular office or committee.
 - d. Will have access to members only benefits via website portal.
 - e. Will receive membership discount rates for continuing education, professional development, or other related events sponsored by the IOTA, and other state associations having reciprocity with the IOTA.
 - f. A member is in good standing if they meet the qualifications for membership in the appropriate category, have paid the appropriate fee, and uphold the standards and ethics of the IOTA. An OT Practitioner is in good standing if they are also legally in compliance with the State of Idaho's OT Practice Act and Rules and Regulations per the Idaho Division of Occupational and Professional Licenses (DOPL).
- B. Students:
 - a. May attend all open meetings of the IOTA.

- b. May vote at open business meetings, such as the Annual Business Meeting, on items pertaining to the Association including but not limited to amending By-Laws, ratifying the budget and election of officers.
- c. May serve on committees subject to the qualifications established for the particular committee.
- d. Will have access to members only benefits via website portal.
- e. Will receive membership discount rates for continuing education, professional development, or other related events sponsored by the IOTA, and other state associations having reciprocity with the IOTA.
- f. A member is in good standing if they meet the qualifications for membership in the appropriate category, have paid the appropriate fee, and uphold the standards and ethics of the IOTA.

Section 4.04 Reciprocity. Members of other occupational therapy associations who are affiliates of AOTA shall be accepted as members in like status, upon presentation of a notice of transfer duly signed by the President of the association from which the member is transferring. Other State associations who have reciprocity with the IOTA may also provide benefits, such as discounted attendance to continuing education courses to the IOTA members in good standing.

Article V.

Officers

Section 5.01 Officers. The officers of the IOTA shall be:

- A. President
- B. President Elect
- C. Vice President
- D. Secretary
- E. Treasurer
- F. Continuing Education and Conference Planning Chairperson
- G. Legislative, Advocacy and Reimbursement Chairperson
- H. OTA Representative
- I. Representative Assembly Delegate
- J. MOT Student Representatives
- K. OTA Student Representatives
- L. Outreach Chairperson
- M. District Representatives:
 - a. Southwest
 - b. South Central

- c. East
- d. North
- e. Central

Section 5.02. Elections and Terms of Office. Officers of the IOTA shall be elected either by the means described in Article X, Section 10.01 or Section 10.02 of these By-Laws, with the terms as follows.

- A. All officers with the exception of the MOT and OTA student representatives and AOTA Representative, will serve a term of two (2) years.
- B. In the event that the President-Elect is elected in the middle of the current President's term, the President will remain in the President role through the time period of the President-Elect's official two (2) year term to allow for full transition of the President-Elect to President at the end of the President-Elect's term.
- C. The MOT and OTA Student Representatives will serve a term of one (1) year.
- D. Prior Executive Board Members that have filled that position may re-apply for another term for one consecutive term only.
- E. The AOTA Representative shall be a three (3) year term elected through AOTA.
- F. All terms of IOTA executive officers, with the exception of the AOTA Representative, shall commence either after installment during the Annual Business Meeting of the year elected, or if outside of the Annual Business Meeting period, at that date of installment through the end of the term ending in the next associated Annual Business Meeting period.

Section 5.03. Eligibility and Qualifications.

- A. The offices of President and President Elect shall be filled by a current member in good standing of the IOTA and AOTA.
- B. All other officers shall be filled by a current member in good standing of the IOTA.

Section 5.04 Duties. In addition to the rights and duties provided elsewhere in these bylaws or as custom parliamentary usage may require, the officers have the rights and duties assigned to them as follows:

- A. President
 - a. The President is the Chief Executive of the IOTA and presides at all meetings of the Association and the Executive Board.
 - b. Shall preside over the IOTA for two years after completing two years of training as the President Elect.

- c. Shall appoint all committee chairpersons except as otherwise provided in these bylaws and be an ex-officio member of all committees.
- d. Shall submit all records, reports, credentials and other materials as may be requested by AOTA.
- e. Shall attend the annual ASAP (Affiliation of State Association Presidents) meetings if at all possible to represent the state of Idaho.
- f. As leader of the Executive Board, shall provide supervision for an Administrator position if filled.
- g. Shall cast the deciding vote in case of a tie vote of the Executive Board.
- h. Shall assure the advocacy of occupational therapy in all functions and activities of the IOTA.
- i. Shall help to coordinate with the Administrator (if this position is filled), submission of requested materials and related articles to the IOTA website manager to keep the website up to date with Association and state and national occupational therapy related events and business as applicable on a routine basis throughout the year.

B. President-Elect

- a. Shall attend the annual ASAP (Affiliation of State Association Presidents) training for the office of President if at all possible at least one year.
- b. Shall shadow the President to become familiar with IOTA standard operating procedures, legislative issues, and education and awareness programs and provide counsel as needed.
- c. In conjunction with the President, shall prioritize, initiate and oversee the Strategic Plan in an effort to ensure a smooth transition process.
- d. Shall gain background information about IOTA, its members and issues by attending District and SIS meetings, promoting IOTA, and identifying and grooming future leaders.
- e. May serve as a member of any committee at any time that is open to IOTA officers, or oversee a committee as nominated by the President with a majority vote by the Executive Board to this appointment.
- f. Shall serve as a voting member of the Executive Board.

C. Vice President

- a. Shall discharge the duties of the President in his/her absence.
- b. Shall succeed to the Presidency for the remaining portion of the term upon death, resignation, removal or disqualification of the President.
- c. May serve as a member of any committee at any time that is open to IOTA officers, or be appointed to Chair of a committee as nominated by the President or

requested by the Executive Board with a majority vote by the Executive Board to this appointment.

- d. Shall serve as a voting member of the Executive Board.
- e. Shall discharge other duties as designated by the President.

D. Secretary

- a. Shall be responsible for the minutes of the meetings of the IOTA and in coordination with the President submit to the IOTA website manager to put up on respective section of the IOTA website for membership and distribute to Executive Officers and members not in attendance via electronic means.
- b. Shall track the motions and charges of said meetings for continuity and follow-up actions.
- c. May serve as a member of any committee at any time that is open to IOTA officers, or be appointed to Chair of a committee as nominated by the President or requested by the Executive Board with a majority vote by the Executive Board to this appointment.
- d. Shall serve as a voting member of the Executive Board.
- e. Shall send to the President, Secretary and Executive Director of AOTA a complete roster of current IOTA Officers.
- f. Should the office of President and Vice President become vacant at the same time, the Secretary shall act as pro-tem until a special election can be held.
- g. Shall collect agenda items from the President and Administrator and notify membership of items of discussion for upcoming meetings following the requirements outlined in these By-Laws.
- h. Shall maintain a copy of the current By-Laws and file them with the AOTA as indicated.

E. Treasurer

- a. Shall be responsible for information related to the collection of dues, fees and other monies paid into or belonging to the Association.
- b. Shall be responsible for overseeing accounts of receipts and disbursements of the IOTA.
- c. Shall serve as the Chair of a Financial Committee.
- d. May serve as a member of any additional committee at any time that is open to IOTA officers.
- e. Shall report at the Annual Business Meeting and submit to the Executive Board at regular meetings a statement of the financial affairs of the Association in collaboration with the Administrator (if this position is filled), including but not limited to the current status of budget and financial review for Association related events and meetings, and periodically as requested by the President.

- f. Shall be responsible for creation of, with the support of relevant committee members, the annual budget.
- g. Shall serve as a voting member of the Executive Board.

F. Continuing Education and Conference Planning Chairperson

- a. Shall be responsible for coordination of continuing education and annual conference events for the IOTA and shall submit to the Association website manager in coordination with the President and/or Administrator as applicable requested materials or articles related to these events to keep the Association website up to date on a routine basis.
- b. Shall provide reports on a regular basis to the Executive Board.
- c. Shall serve as the Chair of the IOTA Annual Conference Committee and any other continuing education related event committees or subcommittees as requested by the Executive Board.
- d. May serve as a member of any other committee at any time that is open to IOTA officers.
- e. Shall serve as a voting member of the Executive Board.

G. Legislative, Advocacy and Reimbursement Chairperson

- a. Shall be responsible for coordinating efforts to address reimbursement, advocacy and legislative issues pertinent to the IOTA, including but not limited to coordinating with the IOTA lobbyist if applicable, participating in AOTA related advocacy, legislative or reimbursement related activities, planning of the annual Hill Day event, etc.
- b. Shall provide reports on a regular basis to the IOTA Executive Board.
- c. Shall be responsible for submitting to the Association website manager in coordination with the President and/or Administrator as applicable requested materials or articles related to legislative, advocacy, or reimbursement issues or events to keep the Association website up to date on a routine basis.
- d. Shall be the Chair of a related Legislative/Advocacy/Reimbursement Committee, and create and oversee any related sub-committees or as requested by the Executive Board related to legislative, advocacy or reimbursement issues.
- e. May serve as a member of any other committee at any time that is open to IOTA officers.
- f. Shall serve as a voting member of the Executive Board.

H. OTA Representative

- a. Shall represent the interests of OTA membership to the Executive Board
- b. Will encourage OTA participation within the IOTA.

- c. May serve as a member of any committee at any time that is open to IOTA officers, or be appointed to Chair of a committee as nominated by the President or requested by the Executive Board with a majority vote by the Executive Board to this appointment.
 - d. Shall be a voting member of the Executive Board.
 - e. Shall be responsible for submitting to the Association website manager in coordination with the President and/or Administrator as applicable requested materials or articles related to OTA issues or events to keep the Association website up to date on a routine basis.
- I. Student Representatives
- a. Shall represent the interest of student membership to the Executive Board, with up to two Student Co-Representatives selected from each OTA and MOT program respectively.
 - b. Student Representatives may be nominated by respective OTA and MOT program faculty and/or apply directly for the open positions. The current Student Representative or Co-Representatives may be chosen by the prior year's Student Representatives from within the nomination pool as part of the selection process, with participation from the President and related nomination committee if applicable.
 - c. Shall encourage student participation within the organization.
 - d. Shall be a member of any committee at any time that is open to IOTA officers, including but not limited to participation with the Outreach Committee.
 - e. Shall be a voting member of the Executive Board.
- J. Outreach Chairperson
- a. Shall develop relationships with practitioners and employers.
 - b. Shall promote activities that generate interest in occupational therapy
 - c. Shall suggest and coordinate participation in community events and activities.
 - d. Shall oversee the District Representatives to form and preside over the Outreach Committee as Committee Chair.
 - e. Shall maintain and send out a regular newsletter on current IOTA affairs to the membership.
 - f. Shall be responsible for submitting to the Association website manager in coordination with the President and/or Administrator as applicable requested materials or articles related to IOTA or District events or activities to keep the Association website up to date on a routine basis.
 - g. Shall be a voting member of the Executive Board.

K. District Representatives

- a. Up to two Co-Representatives may serve together for each District.
- b. Shall work under and with the IOTA Outreach Chairperson as part of the Outreach Committee.
- c. Shall develop relationships and become a liaison for practitioners and interested parties within his/her District.
- d. Shall organize and promote activities within his/her District that generate interest in occupational therapy within and outside the OT practitioner community as well as with the student membership, including with the Outreach Chairperson submission of materials and articles related to District events and activities to be posted on the Association website on a routine basis.
- e. Shall organize a goal of two Outreach opportunities per year for his/her District to facilitate networking and further promote OT awareness.
- f. Shall coordinate, with the Continuing Education and Conference Planning Chairperson and Outreach Chairperson, continuing education events in his/her district as appropriate.
- g. May serve as a member of any committee at any time that is open to IOTA officers in addition to the Outreach Committee.
- h. Shall be a voting member of the Executive Board.

L. Administrator

- a. Any current Executive Board member may at any time also participate in a paid administrative position to serve the interests of the Association, following a majority vote of this appointment by the presiding Executive Board.
- b. Shall coordinate with the website manager to update website content.
- c. Shall send out information via email or social media to the membership.
- d. Shall assist with other duties including but not limited to job posting requests, association email account management, management of current membership list, continuing education or conference related tasks, and complete additional administrative tasks as assigned by the IOTA.
- e. The IOTA Administrator need not be a member of the IOTA or a licensed practitioner, and may be appointed by a majority vote of the Executive Board.

Section 5.05. Vacancies.

- A. In the case of a vacancy in the office of the President, the Vice President will succeed to that office for the remainder of the term.
- B. In case of vacancies in other offices, the President may put forth a candidate and with a majority vote by the Executive Board make an appointment for the remainder of the term.

Article VI.

Representative Assembly Delegate

Section 6.01. Eligibility and Qualifications.

- A. The position of Representative Assembly Delegate may be filled by any category A members (Section 4.01).
- B. Qualifications are defined as by the AOTA.

Section 6.02. Terms of Office. The Representative Assembly Delegate shall be elected for a term of three (3) years. The Representative shall be elected in the years assigned to AOTA by the rotation plan of the Representative Assembly. The Representative may not be elected to more than two consecutive terms. The Representative elected to fill an unexpired term shall be eligible for re-election. In no event shall he/she serve more than eight (8) consecutive years. The Representative shall assume office on the first day of July following election.

Section 6.03. Duties and Responsibilities.

- A. The Representative is seated and becomes a member of the Representative Assembly of AOTA, functions of which are stated in the AOTA Bylaws and the Procedural Guide for the Representative Assembly.
- B. The Representative serves as a consultant to the IOTA, attending all Board Meetings.
- C. The Representative is not a voting member of the Association.

Section 6.04. Vacancies.

- A. If a vacancy occurs in the office of the Representative, a new Representative will be appointed for the remainder of the term per AOTA protocol.

Article VII.

Special Interest Sections (SIS)

Section 7.01 Definition, Composition and Function.

- A. The IOTA may at any time create a SIS to meet the needs of its members. Any IOTA member may be a member of any SIS.
- B. An SIS is a group of members with interest in a similar specialty area of practice. The groups function to encourage the sharing of ideas, mentoring and to further continuing education in each specialty area.
- C. Only members of IOTA may be members of a SIS.
- D. Dates and location of SIS group meeting will be decided on by the chairperson of each SIS group.

Section 7.02 Leadership.

- A. The SIS will have an SIS Chairperson. The Chairperson will be responsible to report to the IOTA Executive Board on a regular basis. The Chairperson will be elected by a majority vote by all SIS members and approved by the IOTA Executive Board.

Section 7.03 Duties.

- A. For any SIS formed the Chairperson will report to the Executive Board on SIS membership and activities as requested at scheduled meetings.
- B. An SIS can meet at any time for any designated amount of time as determined by the SIS members and SIS Chairperson.

Section 7.04 Dissolution. The Executive Board may by majority vote to dissolve an inactive SIS.

Section 7.05 Minutes. Minutes will be recorded at each SIS meeting and will be kept on file with IOTA meeting minutes.

Article VIII.

Executive Board

Section 8.01 Duties.

- A. Shall manage the affairs of the Association.
- B. Shall have general charge of all business interests of the IOTA.
- C. Shall develop plans to promote the growth of the IOTA and its members.
- D. Shall receive and act upon reports from all Chairpersons.

Section 8.02 Composition. The Executive Board shall be composed of:

- A. Officers of the IOTA
- B. AOTA Representative Assembly Delegate

Section 8.03 Quorum. A quorum shall be five (5) Board Members.

Section 8.04 Meetings.

- A. The Executive Board shall meet at the request of the President or as specified elsewhere in these by-laws.
- B. At least three (3) meetings shall be held each year.
- C. Meetings are open to the membership.
- D. IOTA Board minutes shall be provided via email to absent Board members.

Section 8.05 Presiding Officer. The President of IOTA shall be the Presiding Officer of the Executive Board.

Article IX.

Committees

Section 9.01 Committees. There may be the following committees, with additional committees to be created at any time by the request of the President and/or Executive Board:

- A. IOTA Annual Conference /Continuing Education
- B. Legislation, Reimbursement and Advocacy
- C. Finance
- D. Outreach
- E. Tech and Social Media Committee

Section 9.02 Duties.

- A. Each committee will outline its own goals and purpose and submit these to be kept on file with other IOTA documents. Each committee will report on their respective progress at each Board meeting, and establish the dates/times of meeting in-between Board meetings.
- B. Each committee chairperson shall submit to the membership an Annual Report at the Annual Business Meeting.

Section 9.03 Chairperson.

- A. The Chairperson(s) of the Legislative, Reimbursement and Advocacy, Outreach, and Continuing Education Committees shall be elected positions of the Executive Board.
- B. The Treasurer shall be the Chairperson of the Finance Committee.
- C. The Continuing Education and Conference Planning Chairperson will be the chairperson of the IOTA Annual Conference /Continuing Education Committee.
- D. The Chairpersons of these respective committees may create sub-committees to serve the purposes of these committees at any time, or as requested by the Executive Board.

Article X

Annual Elections

Section 10.01 Elections at the Time of the Annual Business Meeting.

- A. Slate
 - a. The Executive Board shall attempt to prepare a slate of candidates for each elective position that is open at the time of the Annual Business Meeting, based on the nominations submitted, after a period of vetting of the candidates by the President and additional Executive Board members as requested.
 - b. No member's name may be put on the ballot without his/her consent.
 - c. Candidates shall have a rationale submitted for why they should be elected for the position(s) nominated for, and a biography, to be used to provide background information to the Executive Board and membership to make an informed decision as to their qualifications for voting purposes.

B. Voting

- a. The Executive Board shall prepare the slate of candidates to be sent to voting members at least four (4) weeks prior to the established Annual Business meeting of that year via electronic means.
 - b. The ballots shall be returned to the Executive Board no later than two (2) weeks prior to the Annual Business Meeting of that year by electronic means. The results will be announced at the Annual Business Meeting and are also to be posted to the IOTA website and social media platforms as well as sent out via electronic means.
- C. Validations: Returned ballots are required to validate the election.
- D. Plurality: Plurality vote shall determine the election.
- E. Nomination Results: All valid ballots must be counted and confirmed by two (2) Executive Board members to validate the election.

Section 10.02 Elections Outside of the Annual Business Meeting.

- A. Should an open Board position go unfilled by the time of the Annual Business Meeting, nominations may continue during the year to fill the position.
- B. A committee made up of current Executive Board members shall review and vet the candidates, and put forth to membership via electronic means the candidate's qualifications, including nomination submission and biography.
- C. Membership will be notified at least fifteen (15) days in advance of the respective candidate being put forth and for attendance at a Board meeting with a vote to be taken by membership to determine election of the candidate.

Article XI.

Meetings

Section 11.01 Regular Meetings.

- A. The IOTA will conduct its Annual Business Meeting during the Annual Conference and hold at least three (3) other meetings during the year to accomplish the objectives of the IOTA.
- B. Voting at meetings is restricted to Executive Board Officers with voting privileges.

Section 11.02 Special Meetings.

- A. Special meetings of the Executive Board for any purpose or purposes may be called at any time by the President or by a majority of the Executive Board Members. The person

or persons authorized to call special meetings of the Executive Board will secure the location for holding the special meeting.

Section 11.03 Notice. Notice of any special meeting shall be given at least ten (10) days previously thereto by written notice delivered personally, by telephone call, or electronically mailed to each Board Member. The attendance of a member at a meeting shall constitute a waiver of notice of such meeting, except when an Executive Board Officer attends a meeting for the express purpose of objecting to the transaction of any business because the meeting is not lawfully called and convened.

Article XII.

Dues

Section 12.01 Payment. Dues will be payable to IOTA at the time of the Annual Conference registration. Members who are not attending the Annual Conference will have dues payable to IOTA at their anniversary of membership each year.

Section 12.02 Amount. The amount of the annual dues shall be determined by the Executive Board subject to the approval of a majority of members during any called Executive Board Meeting, with membership notified via IOTA website, social media and/or electronic mail.

Article XIII.

Fiscal Year

Section 13.01 Fiscal Year. The fiscal year shall be from July 1 to June 30.

Article XIV.

Quorum

Section 14.01 Quorum. A quorum of one-tenth (1/10) of the voting members must be present to conduct business at the Annual Conference.

Article XV.

Parliamentary Authority

Section 15.01 Parliamentary Authority. The current edition of Roberts Rules of Orders, revised, shall be the parliamentary authority for all matters of procedure adopted by the Association.

Article XVI.

Ethics and Discipline

Section 16.01 Ethics. The members of IOTA will adhere to AOTA's standards of practice/conduct.

Section 16.02 Discipline. Membership in IOTA may be suspended at any time by a majority vote of the Executive Board for malpractice, or for conduct unbecoming a member of this association.

Article XVII.

Amendments

Section 17. 01 Proposed Amendments.

- A. An appointed committee made up of any active officers of the Executive Board shall review By-Laws and Policies and Procedures every three (3) years at a minimum.
- B. The President may request a review of these By-Laws and/or Policies and Procedures as needed, at which time a committee will be appointed to review and propose amendments to the By-Laws.

Section 17.02 Approval. An amendment to these By-Laws may be made at any called meeting of the IOTA by a two-thirds vote of the active members present or by a majority of sent ballots returned. Amendments to the Policies and Procedures may be made at any called meeting of the IOTA, to be voted upon by the Executive Board and ratified by a majority vote of those present.

Section 17.03 Technical Corrections.

- A. The By-Laws committee when formed shall have the authority to make technical, editorial, and clerical corrections to keep the By-Laws accurate without calling for a vote of the membership.
- B. Any reasonable doubt as to whether a correction is technical, editorial, or clerical as opposed to substantive shall be resolved by submitting a motion to the Executive Board for a vote.