

# AAAOM-SOCC

Policy and Procedure Manual  
Version 2, 2010



Greetings!

On behalf of the AAAOM-SO, I'd like to officially welcome your school as an official AAAOM-SO College Chapter.

Please review the following pages, which outline the expectations and guidelines that will help your College Chapter effectively contribute to the future of AOM, both locally and nationally.

Please retain this original Policy and Procedure Manual copy. In subsequent years, your chapter will be sent any updated pages/sections of the Manual only. The current version of the manual can always be found on the AAAOM website as well.

If you have any questions, please contact your AAAOM-SOC (Student Organization Council) contact or the current AAAOM-SO Director of Membership. Contact information can be found on the AAAOM website [www.aaaomonline.org](http://www.aaaomonline.org)

Thank you, and we look forward to working with you.

Best regards,

Your AAAOM-SOC

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# PREFACE

### **AAAOM History**

The American Association of Acupuncture and Oriental Medicine (AAAOM) was formed in 1981 to be the unifying force for American acupuncturists who are committed to high ethical and educational standards, and a well regulated profession to ensure the safety of the public. There was a split in our profession in 1993, resulting in two organizations being formed: The American Association of Oriental Medicine (AAOM) and the AOM Alliance. On February 1, 2007, the two organizations again reunited to form a new organization, The American Association of Acupuncture and Oriental Medicine (AAAOM). By taking the name of the organization that split in 1993, the new organization has signaled that events of the past that led to the split have been resolved, and that a new era in Acupuncture and Oriental Medicine leadership has arrived. The AAAOM is incorporated as a 501(c)(6) Professional Corporation and is governed by a 16-person Board of Directors, consisting of 12 Directors and 4 Alternate Directors. The AAAOM has sixteen Standing Committees.

**Note:** As a result of the merger, the Board of Directors was larger. On the first election following this reunification (October 2007), the membership, as governed by the AAAOM By-Laws, voted in new directors. At that time, the AAAOM Board of Directors returned to a governance of 12 individuals.

**Corporate Offices:** In June 2004, the AAAOM moved their corporate of Offices from Chevy Chase, Maryland to Sacramento, California.

### **AAAOM Mission Statement**

To promote excellence and integrity in the professional practice of acupuncture and Oriental medicine, in order to enhance public health and well being.

### **AAAOM Purposes**

- To establish, maintain and advance the professional field of Oriental medicine, with acupuncture and other modalities, as a distinct, primary care (ability to exercise professional judgment within the scope of practice) field of medicine.
- 
- To integrate acupuncture and Oriental medicine in to mainstream health care in the United States.
- 
- To advance the science, art and philosophy of acupuncture and Oriental medicine.
- To protect the body of knowledge of acupuncture and Oriental medicine.
- 
- To advance the professional welfare of our members.
- 
- To educate legislators, regulators, healthcare interests and the public regarding Acupuncture and Oriental medicine.
- 
- To develop and maintain standards of ethics, education and professional competence, and to promote research and inter-professional relationships, nationally and internationally.
- 
- To insure that the public receives high quality AOM services
- 
- To educate the public
- 
- To serve the public effectively through improving access to our services

### **AAAOM Values**

- Integrity – that we do what we say we do
- Honesty – that we say what we do
- Excellence – that we seek the highest quality in all of our efforts
- Impeccability – that we act authentically from our values
- Trust – that we are impeccable in our communications and treatment of each other
- Compassion – that we care for each other, our community and the planet
- Responsibility – that we act with integrity and honesty in the fulfillment of our pur-view
- Consideration – we are thoughtful of ourselves, the leadership team, the membership, the profession, and the wellness of the public and the place where they reside.
- Diplomacy – that we communicate in a way that is imbued with emotional intelligence and for the greatest good
- Transparency – that we maintain no covert processes
- Diversity – that we respect and embrace the full plurality of practices within the medicine
- Validity of current practice standards
- Fully trained AOM practitioners

## **American Association of Acupuncture & Oriental Medicine Student Organization**

### ***An Introduction & History***

The AAAOM-SO was officially founded in 2006, at the AAOM National Conference in Phoenix, AZ. The groundwork for this organization began in 2002, when AAOM Directors Gene Bruno and William Pettis wrote the bylaws and guidelines of the first national student organization. This was followed up at the AAOM's national conference in Orlando, FL in 2003 by student caucus meetings to organize students nationally. Director Cynthia O'Donnell organized these caucuses in 2003, 2004, 2005 and 2006.

The 2005 Chicago, IL AAOM National Conference was a major turning point for the future of the AAOM-SO. Here, students from across the nation gathered at the national student caucus and began the processes for development of the current AAAOM-SO. The students, under the direction of Rhonda (Wilbur) Shine, from Midwest College in Wisconsin, and

Koala (Moore) Moredo, from Five Branches Institute in California, divided into two task forces at this meeting, the Development Task Force and the Legislative Task Force. A year's worth of hard work and dedication brought them to the official adopting of bylaws and the formation their board, the Student Organization Council (SOC) in October of 2006, under a charter from the AAOM.

**AAAOM-SO Mission Statement:** "Promoting communication and cooperation between Acupuncture and Oriental Medicine students, professionals, and government agencies in an effort to insure optimal standards of care and integrity in the professions of Acupuncture and Oriental Medicine."

**AAAOM-SO Action Statement:** "The AAAOM-SO represents and advocates on behalf of all Acupuncture and Oriental Medicine students nationwide for the opportunity to provide quality health care to the public, advance competent research and public awareness,

and preserve the equitable and just interests of all practitioners of Acupuncture and Oriental Medicine.”

### **AAAOM-Student Organization Council (SOC)**

The AAAOM-SOC is the national officer team of the AAAOM-SO. These individuals are responsible for developing student membership of the AAAOM, informing AOM students nationwide about AAAOM events and activities, AOM news and providing a communication network for students to learn, share and develop professional skills.

The structure of the AAAOM-SOC has changed over the years and currently stands as 7 elected positions: President, whom also serves on the AAAOM Board of Directors, Vice-President, Treasurer, Secretary, Director Communication, Director of Events, Director of Membership. Additionally, the immediate past President serves as President Emeritus and there are 2 Alternate Officer positions. The Alternate positions may be appointed by the President, and confirmed by the SOC, at any time during the year. The role is for students that show dedication and passion to contribute to the AAAOM-SO and had not run for elected office.

For contact information of the current AAAOM-SOC please visit the AAAOM website at [www.aaaomonline.org](http://www.aaaomonline.org).

### **History of Your College Chapter**

The intention of the following page(s) are for you, as a college chapter, to begin (and continue) the documentation process of the history of your chapter, for the sake of future student members at your school.

Things to consider including in the information are:

When was the chapter formed?

Who was responsible for its formation?

What have you, as a group, accomplished from year to year, be it highlights of fundraising, membership milestones, local outreach events, participation in the national dialogue, etc.?

## **AAAOM-SOCC Bylaws**

### **ARTICLE I - GENERAL/CHARTER**

#### **Section 1 - Name**

The name of this organization shall be the "American Association of Acupuncture and Oriental Medicine - Student Organization College Chapter," hereafter referred to as "AAAOM-SOCC." The governing body of the AAAOM-SOCC will be an elected group of Officers that represents the General Membership.

#### **Section 2 - Establishment/Charter by AAAOM**

Provisions for establishment, formal organization, and operation of the AAAOM-SOCC are under an official charter granted to the AAAOM Student Organization Council (SOC) by the AAAOM. This charter requires the AAAOM-SOCC to adopt bylaws approved by the AAAOM-SOC, which can be amended only with the approval of both the AAAOM-SOC and AAAOM.

#### **Section 3 – AAAOM-SOC and the AAAOM-SOCC**

The AAAOM-SOC is dedicated to the formation of chapters and is a liaison (1) among students attending acupuncture schools and (2) between students attending acupuncture schools and the national organization. The SOC collectively is responsible for contacting students in all six regions across the country: Northwest Pacific, Southwest Pacific, Mountain, Central, Northeast Atlantic and Southeast Atlantic.

#### **Section 4- Formal acknowledgement of an AAAOM-SOCC**

Acknowledgement of an AAAOM-SOCC is done by having completed the official AAAOM-SOCC I College Chapter Charter. This Charter is a historical and binding document, which signifies adherence to bylaws set by the AAAOM-SO and AAAOM. This Charter can be obtained from the college's AAAOM-SOC contact or Director of Membership.

### **ARTICLE II – PURPOSE**

The Purpose of the AAAOM-SOCC shall be the same as the AAAOM-SO, which shall be as follows:

1. To promote and support high standards of practice, education, and research in acupuncture and Oriental medicine.
2. To promote intercollegiate functions, share solutions to mutual problems, and support legislation promoting acupuncture and Oriental medicine.
3. To provide a platform for students to have a voice in local, regional and national issues that affect the practice of acupuncture and Oriental medicine.
4. To represent students and their interests at Regional AAAOM-SO Conferences and at the National Conference of the AAAOM.

5. To serve as a liaison among students of acupuncture and Oriental medicine, student associations, governmental bodies, and private groups to inform students and the AAAOM of significant happenings within these groups.
6. To promote cooperation between students of acupuncture and Oriental medicine and licensed acupuncture and Oriental medicine professionals, promote cooperation between Oriental medicine associations, and promote cooperation relating to Oriental medicine research in the field and within the U.S. Acupuncture and Oriental Medicine Colleges, hereafter referred to as "Colleges."
7. To track legislation that directly or indirectly affects acupuncture and Oriental medicine in individual states, regions, or nationally, in which the AAAOM-SO has membership affiliations and/or interests.
8. To collaborate with and support the interests of the parent organization, the AAAOM, with clear understanding that the AAAOM-SOC is the ultimate authority with regard to AAAOM-SO policies and actions.
9. To help guide, direct, and support local, state and national public relations efforts to increase public awareness and interest in acupuncture and Oriental medicine.

*Note:* The purpose of the AAAOM-SOCC shall be only that stated above. The AAAOM-SOCC shall not be a platform to address local school issues and policies. The AAAOM-SOCC name may not be used in any manner for purposes outside those stated above.

### **ARTICLE III - MEMBERSHIP to the AAAOM-SOCC**

#### **Section 1 - Categories of Membership**

There shall be two categories of membership: Liaison and Student.

##### **A. Faculty Advisor**

- (i) A faculty advisor must be a current member in good standing with the AAAOM.
- (ii) A faculty advisor must be currently on staff at the college he/she is representing in the AAAOM-SOCC. This college must meet criteria, which will allow its graduates to sit for the NCCAOM examination in Acupuncture & Oriental Medicine.
- (iii) The faculty advisor shall be elected by their college's AAAOM-SOCC and will serve indefinitely, until they are no longer employed by said institution, or until they are replaced or removed by the AAAOM-SOCC (see Article VI - Voting).
- (iv) The faculty advisor position is to help maintain continuity and facilitate dissemination of information within each College Chapter; however, it is not a required position in order for a College Chapter to exist. The faculty is an optional support position, and holds no authority over the student College Chapter.

##### **B. Student**

- (i) A student member must be a current member of AAAOM-SO.
- (ii) A student member must be currently registered and in good standing at an ACAOM accredited college of acupuncture & Oriental medicine.

(iii) Student members may continue to work with the AAAOM-SOCC and be elected as officers for the AAAOM-SOCC for up to one year following their official graduation, or for the same time period following any academic leave of absence prior to graduation. If a student member returns to an NCCAOM recognized college to continue their degree following an academic leave of absence, they may resume service work with AAAOM-SOCC and run for elected office, with one additional year of service following graduation still available to them.

## **Section 2 - Application for Membership**

Application for membership to the AAAOM-SO shall be made via application forms on the official AAAOM website ([www.aaaomonline.org](http://www.aaaomonline.org)).

## **Section 3 - Officers and Representatives**

The AAAOM-SOCC shall be governed by elected officers selected by the College Chapter.

### **Officers**

(i) The AAAOM-SOCC Officer positions shall be President, Vice President, Treasurer, and Secretary.

(ii) Officers shall be nominated from among the General Membership of an individual school's AAAOM-SOCC. Officers shall be elected by the General Membership of the AAAOM-SOCC as described in ARTICLE VI (Voting). Self-nomination is allowed.

(iii) Each Officer shall hold office for a one-year term, with no term limits, until his/her successor has been elected and qualified, unless he/she resigns or is removed. Elections will be held once yearly as determined by said AAAOM-SOCC.

(iv) Officer Holdings- Ideally, each of the four offices will be held by a different person. In smaller chapters, however, where fewer participating members are available, it is acceptable for one person to hold two or more of the offices of Secretary, Treasurer, and Vice President; with the exception of the President, who may not hold any other office (for example, a College Chapter may combine the offices of Secretary and Treasurer).

(v) In the event that an officer position is vacant at any time and for any reason, this position may be filled by an appointment from the President of an AAAOM-SOCC and confirmed by a majority vote of the AAAOM-SOCC. If the vacant position is that of President, the appointment shall be made by the remaining officers of the AAAOM-SOCC and sustained by a majority vote of the AAAOM-SOCC membership.

(vi) Each officer shall have one vote in AAAOM-SOCC matters, which require voting, with the President abstaining, unless there is a tie vote.

## **ARTICLE IV - OFFICERS' DUTIES**

### **Section 1 - President**

The President shall:

(i) Preside over all meetings of the SOCC General Membership.

(ii) Prepare an agenda for all meetings.

(iii) Communicate as the SOCC Representative with the AAAOM-SOC contact for their region, about chapter activities, affairs, and events.

### **Section 2 - Vice President**

The Vice President shall:

- (i) Assist the President in all duties.
- (ii) Preside over meetings in the absence of the President.
- (iii) Perform the duties of President, if the President is unable to serve.

### **Section 3 - Treasurer**

The Treasurer shall:

- (i) Keep and maintain full and accurate records of all financial transactions of the AAAOM-SOCC, and report thereon to the AAAOM-SOCC Officers and the General Membership.
- (ii) Ensure that the financial policies of the AAAOM-SO/AAAOM are adhered to regarding local SOCC activity.
- (iii) Assist in preparing the AAAOM-SOCC's budget, if requested.
- (iv) Set up and maintain, with the supervision of the President, the AAAOM-SOCC Banking Account, if applicable (see Article VII Section 2).

### **Section 4 – Secretary**

The Secretary shall:

- (i) Be in charge of all AAAOM-SOCC records, with the exception of financial records.
- (ii) Follow the proper recording of meeting proceedings of the General Membership.
- (iii) Notify the General Membership of the date, time, and location of any meeting or event.
- (iv) Be responsible for coordinating the annual Officer Elections, including, but not limited to: nomination, voting, tallying, and posting of results.

## **ARTICLE V – AAAOM-SOCC VOTING**

**A.** AAAOM-SOCC Officer Elections shall be done by secret ballot at an official AAAOM-SOCC meeting. Those nominees receiving the greatest number of votes will be elected as Officers to the AAAOM-SOCC.

**B.** For the purposes of voting on issues, a quorum shall consist of 50% of AAAOM-SOCC members, one of who shall be either the President or Vice President.

**C.** All items presented for a vote shall require a 51% majority vote of members present for passage, with the exception of the following:

1. Removal of an officer must be done by a 2/3-majority vote from a quorum of the SOCC General Membership
2. Removal of student members, or liaisons must be done by a 2/3-majority vote from a quorum of the SOCC General Membership.

***\*\*\*Removal of the above individuals must be based upon "just cause." This includes, but is not limited to, indictment of criminal acts, moral turpitude, or lack of completion of their prescribed duties.***

## **ARTICLE VI - MEETINGS**

### **Meetings of the AAAOM-SOCC**

- A. Meetings of the members of the AAAOM-SOCC shall be held a minimum of eight times each year.
- B. The President shall issue the agenda for each meeting and make it available to all members, preferably on a monthly basis.
- C. Voting done by the SOCC must follow the guidelines provided in Article V.

## **ARTICLE VII - FINANCES/MEMBERSHIP FEES**

### **Section 1 – Membership Fees**

There is no AAAOM-SOCC chapter membership fee, however to participate each student must be a AAAOM member.

This fee is currently \$50 and payable directly to the AAAOM. The funds from membership are used by the AAAOM-SO and AAAOM to create national scholarships, assist in state and national legislative efforts, and provide networking and learning opportunities.

### **Section 2 – Finances**

Finances for the AAAOM-SOCC budget may be raised through local fundraisers, student fees, if determined appropriate, and donations. All funds raised by SOCC's are their own, and not to be used by the AAAOM-SO. Funds may be used as the SOCC deems acceptable, i.e. speakers, community services, conference registrations.

### **Section 3 – Savings Accounts**

AAAOM has established a streamlined program through which Student Organization College Chapters (SOCC's) can obtain banking privileges to conduct the activities of their chapter. This is a **voluntary program**, whereby chapters that do not have a banking relationship through their school, can obtain this relationship through the AAAOM.

Therefore, under AAAOM's Corporate Tax ID number and current banking relationship, savings accounts will be set up for SOCC's, on an as needed basis.

#### **AAAOM Account Management:**

1. **Responsible Party for Local Oversight:** On an annual basis, following the AAAOM-SO Annual Meeting, a responsible party (aka student representative) will be identified by each school to oversee this account with the AAAOM Corporate Offices. Again, this is a voluntary service, and any

SOCC that has a student organization bank account that is overseen by its college administration may forfeit the opportunity to participate in this program.

**2. Service Fees: Savings accounts, which are the least expensive type of account to open and maintain, will be opened** since account activity is deemed to be very low. AAAOM will allocate a minimum balance as a “loan” to each account opened such that service charges will not apply.

**3. Income:** Student representatives may deposit income to these savings accounts through the following means:

- a. Depositing directly to the account at their local branch; via savings deposit slips that are provided by the AAAOM office. Specific bank information can be obtained via the SOCC’s appropriate SOC contact or Director of Membership. A copy of all checks and/or identification of cash deposits must accompany each deposit slip to the account.
- b. A copy of the deposit slip and supporting deposit information must be forwarded to the AAAOM office at the time the deposit is made (via fax, email, or U. S Mail); or
- c. The designated student representative may send deposits and cash to the AAAOM office for processing into their SOCC account.

**4. Disbursements:** To request disbursements; a disbursement request slip will need to be completed and faxed to the AAAOM office to include the following information:

- a. Person requesting disbursement;
- b. Amount and Date of request;
- c. Purpose of disbursement;

Allow a one-week processing time from date of request to date of disbursement.

When each request is received, the AAAOM office will transfer from the requesting SOCC savings account into the AAAOM-SO Checking account and will disburse a check. The supporting documentation will be the completed request form submitted by the SOCC.

**5. Reporting:** AAAOM will provide the SOCC and the AAAOM-SO quarterly reports detailing the account activity from the past quarter. These reports will be transmitted within 45 days of the prior quarter’s end. As an example, a fiscal reporting covering activity from January 1-March 31, will be reported by May 15. An annual activity report will be provided by fiscal year-end.

## **ARTICLE VIII - ACTIVITY/EVENT GUIDELINES**

Each AAAOM-SOCC with at least five members is required to participate in the following activities a minimum of once per year:

(i) Local fundraising to help offset the cost for members to attend the annual national AAAOM conference and to provide local opportunities for AOM students through speakers, education seminars, etc.

(ii) Public relations activities/events to promote Acupuncture and Oriental Medicine by educating the public and to build practice management skills.

(iii) Community/Charitable service activities to support and provide awareness of prevalent issues in the area.

The President of the AAAOM-SOCC shall keep their AAAOM-SOC Contact informed of all AAAOM-SOCC activities and events and it is realized that some events may require pre-approval.

## **ARTICLE IX - RULES OF ORDER**

The rules contained in, "*ROBERT'S RULES OF ORDER*," shall govern meetings of the AAAOM-SOCC in all cases, which they are applicable and sufficient representation, is present (i.e. for an AAAOM-SOCC with at least five members).

## **SECTION ONE: PROCEDURE**

## **Establishing a College Chapter**

If you're a student member of the AAAOM-SO, it is very simple to start a College Chapter at your school. The College Chapter Charter is available online at [www.aaaomonline.org](http://www.aaaomonline.org) in the student section. All that is needed to fill out the Charter and get the process started are two interested students and a faculty advisor.

## **College Chapter Charter**

The College Chapter Charter is available online [www.aaaomonline.org](http://www.aaaomonline.org) in the student section and via your school's AAAOM-SOC contact. Once you have completed the Charter, it is to be mailed to your AAAOM-SOC contact. The SOC contact will submit the Charter to the AAAOM office, and official notification and recognition of your College Chapter will soon follow.

## **Officers**

Once established, a College Chapter needs to have elections for the following positions:

President  
Vice President  
Secretary  
Treasurer

The process for elections is listed separately on page 19.

Duties for each position are as follows:

The President shall:

- (i) Preside over all meetings of the SOCC General Membership.
- (ii) Prepare an agenda for all meetings.
- (iii) Communicate as the SOCC Representative with the AAAOM-SOC Contact for their region, about chapter activities, affairs, and events.

The Vice President shall:

- (i) Assist the President in all duties.
- (ii) Preside over meetings in the absence of the President.
- (iii) Perform the duties of President, if the President is unable to serve.

The Treasurer shall:

- (i) Keep and maintain full and accurate records of all financial transactions of the AAAOM-SOCC, and report thereon to the AAAOM-SOCC Officers and the General Membership.
- (ii) Ensure that the financial policies of the AAAOM-SO/AAAOM are adhered to regarding local SOCC activity.

- (iii) Assist in preparing the AAAOM-SOCC's budget, if requested.
- (iv) Set up and maintain, with the supervision of the President, the AAAOM-SOCC Checking Account, if applicable (see Article VII Section 2).

The Secretary shall:

- (i) Be in charge of all AAAOM-SOCC records, with the exception of financial records.
- (ii) Follow the proper recording of meeting proceedings of the General Membership.
- (iii) Notify the General Membership of the date, time, and location of any meeting or event.
- (iv) Be responsible for coordinating the annual Officer Elections, including, but not limited to: nomination, voting, tallying, and posting of results.

Please note that with the exception of the President, one person, if necessary may fill multiple officer positions. For example, if your College Chapter is small or in its infancy, one member could hold both Secretary and Treasurer positions.

### **College Chapter Bylaws**

Every College Chapter is by nature agreeing to exist according to the SOCC bylaws. The bylaws cannot be changed under any circumstances. However, the AAAOM-SOC does recognize that each College Chapter is a unique entity; if, after reviewing the AAAOM-SOCC Policy & Procedure Manual, you deem it necessary to modify any part of the Policy & Procedures in response to something that occurs at your individual school (because of how classes are structured, different tracks of students meeting on different days, etc.), it is within your rights as a College Chapter to offer proposed procedural modifications to your College Chapter's Policy and Procedure manual for approval by the AAAOM-SOC and AAAOM.

Example: At Tai Sophia Institute, there are two tracks of students that rarely overlap in their studies. They proposed that they have 2 Vice Presidents, one for each track of students. This was accepted by the AAAOM-SOC and AAAOM.

### **Elections**

AAAOM-SOCC Officer Elections shall be done by secret ballot at an official AAAOM-SOCC meeting. Those candidates receiving the greatest number of votes will be elected as Officers to the AAAOM-SOCC.

The Secretary is responsible for officiating elections, including taking nominations, voting, tallying, and posting results.

Your College Chapter can create its own online voting process, subject to approval from the AAAOM-SOC and AAAOM-SO (see Approval Process below)

### **Approval Process**

In order to assure that any College Chapter activity, be it a change in Chapter Policy & Procedures or the planning of an event, conforms with the purposes and scope of a College Chapter, contact your SOC Contact with your proposal. In some cases, approval may

need to come from the AAAOM Board of Directors. For time management/planning purposes, it will serve your Chapter to submit your proposal to your Contact early in the process, to ensure that there is ample time to receive approval.

### **National/Local Communication Chain of Command**

In order to have information flow as smoothly as possible between the AAAOM-SOC and your College Chapter, it is important to note the established chain of command in place for communication.

Your AAAOM-SOC Contact is your first and most consistent contact in the AAAOM-SOC. This person will be in contact with you regarding any AAAOM-SO news or action items. Establishing a relationship between your Contact and a member of your officers (ideally the President) is critical. If you have any questions regarding any facet of your College Chapter, your SOC Contact is the person to ask.

If you are having problems communicating with your SOC Contact, Please be in touch with the AAAOM-SO Director of Membership. The SOC's goal is to provide College Chapters with answers to questions in an appropriate time frame. Please note that sometimes questions and answers will need to be sent along appropriate channels between your College Chapter, the AAAOM-SOC, and the AAAOM.

### **Meetings**

Meetings of the members of the AAAOM-SOCC shall be held a minimum of eight times each year. These meetings can be a place where information from the AAAOM-SO/AAAOM can be communicated to student members, fundraising and other event planning, and generally stir the local pot and engage student members to become involved on a local or national level.

The President shall issue the agenda for each meeting and make it available to all members, preferably on a monthly basis.

Any voting done by the SOCC must follow the guidelines provided in Article V of the SOCC Bylaws.

Communicate with your SOC Contact about any meetings that you have, issues that are raised within the meeting, and any actions being planned by your College Chapter.

### **Robert's Rules of Order**

As stated in the AAAOM-SOCC Bylaws (Article IX), all meetings must be conducted in accordance to the parliamentary procedure guidelines stated in the Robert's Rules of Order Manual (RROM) when applicable. Please see the following pages for guidelines regarding the categories below:

- **The Standard Order of Business**
- **Handling Motions**

## ➤ Taking Minutes

### *The Standard Order of Business:*

(Excerpt from Robert's Rules of Order, 10<sup>th</sup> ed.)

It is customary for every society having a permanent existence to adopt an order of business for its meetings. When no rule has been adopted, the following is the standard order of business:

1. Reading and Approval of the Minutes of the Previous Meeting
2. Reports of Officers, Boards, and Standing Committees
3. Reports of Special (Select or Ad Hoc) Committees
4. Special Orders
5. Unfinished Business and General Orders\*
6. New Business

\* The fifth item includes, first, the business pending and indisposed of at the previous adjournment; and then the general orders that were on the calendar for the previous meeting and were not disposed of; and finally, matters postponed to this meeting that have not been disposed of.

The secretary should prepare, prior to each meeting, a memorandum of the order of business for the use of the presiding officer, showing everything known in advance that is to come before the meeting. The chairman, as soon as one thing is disposed of, should announce the next business in order.

### *Handling Motions:*

(Excerpt from Robert's Rules of Order, 10<sup>th</sup> ed.)

1. A member seeks recognition for the floor
2. Chairman recognizes the member (member obtains the floor)
3. Member makes a motion
4. Another member seconds the motion
5. Chairman **states** the question
6. Debate (amendment and secondary motions)
7. Chairman **puts** the question to a vote
8. Chairman announces the result of the vote

### **What Precedes Debate:**

Before a subject is open to debate, it is necessary for a motion to be made by a member who has obtained the floor; next it is seconded (with certain exceptions); and then it is stated by the chair (presiding officer). The fact that a motion has been made and seconded does not place it before the assembly for consideration, as the chair alone can do that. He must either rule it out of order, or state the question on it so that the assembly may know

what is before it for consideration and action. If several questions are pending, as a resolution and an amendment and a motion to postpone, the last one stated by the chair is the "immediately pending" question.

Until the motion is stated or ruled out of order by the chair, no debate or other motion is in order. However, members may suggest modifications to the motion, and the mover, without the consent of the seconder, has the right to make such modifications as he pleases, or even to withdraw his motion entirely **before** the chair states the question. This is the case only for a brief interval, because after the chair states the question, the mover can do neither without the consent of the assembly. A little informal consultation before the question is stated often saves much time, but the chair must see that this privilege is not abused and allowed to run into debate. When the mover modifies his motion, the one who seconded it has a right to withdraw his second. After debate has begun, a second is immaterial.

The procedure in small boards of not more than about a dozen members present is relaxed a bit. The formalities necessary in order to transact business in a large assembly would hinder business in so small a body.

### ***The Minutes:***

(Excerpt from Robert's Rules of Order, 10<sup>th</sup> ed.)

The record of the proceedings of a deliberative assembly is usually called the Minutes, or the Record, or the Journal. In the meetings of ordinary societies, there is no object in reporting the debates; the duty of the secretary, in such cases, is mainly to record what is "done" by the assembly, and not what is said by the members. The minutes should show:

- Kind of meeting, "regular" (or stated) or "special," or "adjourned regular" or "adjourned special";
- Name of the organization or assembly;
- Date/time of meeting and place, when it is not always the same;
- The fact of the presence of the regular chairman and secretary, or in their absence the names of their substitutes,
- Whether the minutes of the previous meeting were read and approved, or approved as corrected, and the date of the meeting if other than a regular business meeting;
- All main motions and motions that bring a main question again before the assembly, stating the wording as adopted or disposed of, and the disposition--including temporary disposition (with any primary and secondary amendments and adhering secondary motions then pending;
- Secondary motions not lost or withdrawn where needed for clarity of the minutes;
- Points of order and appeals, and reasons the chair gives for the ruling;
- Time of adjournment.

Generally the name is recorded of the mover, but not of the seconder, unless ordered by the assembly. When corrections to the minutes are made by the assembly, the corrections are made in the written text of the minutes being approved, and the minutes of the meet-

ing where they are corrected merely state that the minutes were approved “as corrected”, without actually stating the details of those corrections.

The secretary should sign the minutes, and in some societies the minutes are also signed by the president. When the minutes are approved, the word "Approved" should be written on the minutes with the secretary’s initials and the date.

Where the regular meetings are held weekly, monthly, or quarterly, the minutes are read at the opening of each day's meeting, and, after correction should be approved. Where the meetings are held several days in succession with recesses during the day, the minutes are read at the opening of business each day. If the next meeting of the organization will not be held for a long period, as six months or a year, the minutes that have not been read previously should be read and approved before final adjournment. If this is not practical, then the executive committee or a special committee should be authorized to correct and approve them. A special meeting does not approve minutes, and its minutes should be approved at the next regular meeting.

### **Voting**

For the purposes of voting on issues, a quorum shall consist of 50% of AAAOM-SOCC members, one of whom shall be either the President or Vice President.

All items presented for a vote shall require a 51% majority vote of members present for passage, with the exception of the following:

1. Removal of an officer must be done by a 2/3-majority vote from a quorum of the SOCC General Membership
  
1. Removal of student members, or liaisons must be done by a 2/3-majority vote from a quorum of the SOCC General Membership.

Please see Ethics in Section Two re: Just Cause for removal of Officers/Student Members.

## **SECTION TWO: POLICY**

## **Activities/Events**

Per the SOCC bylaws, Each AAAOM-SOCC with at least five members is required to participate in the following activities a minimum of once per year:

(i) Local fundraising to help offset the cost for members to attend the annual national AAAOM conference and to provide local opportunities for AOM students through speakers, education seminars, etc.

(ii) Public relations activities/events to promote Acupuncture and Oriental Medicine by educating the public and to build practice management skills.

(iii) Community/Charitable service activities to support and provide awareness of prevalent issues in the area.

The President of the AAAOM-SOCC shall keep the SOC Contact informed of all AAAOM-SOCC activities and events and it is realized that some events may require pre-approval.

## **Fundraising**

There are any number of types of fundraising events that your College Chapter can engage in to raise money: Silent Auctions, Bake Sales, Parties, etc. Keep in mind the level of appropriateness of any fundraising effort, that it supports the spirit of the purpose of the AAAOM-SO/AAAOM-SOCC. Contact your SOC Contact with your fundraising plans to determine if formal approval by the AAAOM-SO is necessary.

The monies raised by your College Chapter are yours to use as you see fit to help promote AOM, be it to fund a public relations event, a community event for your College Chapter, or to help send student members to the AAAOM Conference to represent your Chapter. The monies should not however be used to fund social activities or events such as dinner parties, vacations, personal purchases. Should a chapter be found to have spent monies in such ways, the officers will be asked to step down, and election of new officers, from people not involved in such spending, shall take place. Please see page 29 for information about removal of Officer due to Just Cause.

There may be occasions where you are offered the opportunity to take part in a fundraising activity organized by the AAAOM or the AAAOM-SO. Each College Chapter has the right to accept or decline the offer, or modify the fundraiser (with approval) to meet the needs of your specific school.

Funds should be deposited and kept in a separate College Chapter bank account. How you set up this account is your choice, be it through your school, or via AAAOM's Savings Account Program that follows:

AAAOM has established a streamlined program through which Student Organization College Chapters (SOCC's) can obtain banking privileges to conduct the activities of local chapters. This is a voluntary program, whereby chapters that do not have a banking relationship through their school, can obtain this relationship through the AAAOM.

Therefore, under AAAOM's Corporate Tax ID number and current banking relationship, savings accounts will be set up for SOCC's, on an as needed basis.

**AAAOM Account Management:**

**Responsible Party for Local Oversight:** On an annual basis, following the AAAOM-SO Annual Meeting, a responsible party (aka student representative) will be identified by each school to oversee this account with the AAAOM Corporate Offices. Again, this is a voluntary service, and any SOCC that has a student organization bank account that is overseen by its college administration may forfeit the opportunity to participate in this program.

1. **Service Fees:** Savings accounts, which are the least expensive type of account to open and maintain, will be opened since account activity is deemed to be very low.. AAAOM will allocate a minimum balance as a "loan" to each account opened such that service charges will not apply.

2. **Income:** Student representatives may deposit income to these savings accounts through the following means:

a. Depositing directly to the account at their local branch ; via savings deposit slips that are provided by the AAAOM office. Specific bank information can be obtained via the SOCC's appropriate SOC Contact. A copy of all checks and/or identification of cash deposits must accompany each deposit slip to the account.

b. A copy of the deposit slip and supporting deposit information must be forwarded to the AAAOM office at the time the deposit is made (via fax, email, or U. S Mail) ; or

c. The designated student representative may send deposits and cash to the AAAOM office for processing into their SOCC account.

3. **Disbursements:** To request disbursements; a disbursement request slip will need to be completed and faxed to the AAAOM office to include the following information:

a. Person requesting disbursement;

b. Amount and Date of request;

1. Purpose of disbursement;

Allow a one-week processing time from date of request to date of disbursement. When each request is received, the AAAOM office will transfer from the requesting SOCC savings account into the AAAOM-SO Checking account and will disburse a check. The supporting documentation will be the completed request from submitted by the SOCC.

Reporting: AAAOM will provide the SOCC and the AAAOM-SO quarterly reports detailing the account activity from the past quarter. These reports will be transmitted within 45 days of the prior quarter's ending. As an example, a fiscal reporting covering activity from January 1-March 31, will be reported by May 15. An annual activity report will be provided by fiscal year-end.

### **Public Relations Events**

The AAAOM-SO recognizes the necessity to commit to public outreach and charitable events locally through College Chapters. Given that one of the missions of the AAAOM/AAAOM-SO is raising the awareness of the public about the benefits of acupuncture, it is natural that we'd want to spread this message locally via College Chapters.

Additionally, these types of events allow students to practice public speaking, honing the way they speak about acupuncture to small groups, and one on one interactions with potential patients, etc.

Consider your local area and populations you can offer information about acupuncture and Oriental medicine to. Set up talks/events at libraries, churches, Farmer's Markets—public places outside of school that you can reach a sizable amount of people.

### **Membership Drive**

The AAAOM-SO has a themed national membership campaign once a year, in which a Half Price Membership Special is offered to students. This reduce fee is open to all new and re-newing student members. The AAAOM-SO Half Price Membership Campaign is conducted under the AAAOM, and can be limited or expanded by them only.

The Half Price Membership Campaign is usually held either in the Spring or Fall, and is one month in duration. The proceeds from the membership drive are split 50/50 between the AAAOM-SO and AAAOM.

An additional AAAOM-SO membership special may only be held under the direction of the AAAOM.

Membership Drive materials will be provided to your Chapter. How you incorporate these materials and execute the Campaign at your school is largely up to you. Each school offers its own unique way of being, so consider how you can adapt the National plan to your Chapter/School.

## **Ethics**

The expectations of the ethics of College Chapters and individual members of the AAAOM-SO are outlined above in the preceding pages. There are several topics, though, that need to be made clear to each College Chapter:

### **Local issues and the AAAOM/AAAOM-SO**

Local issues at your school are not within the scope of the AAAOM/AAAOM-SO/AAAOM-SOCC. If something comes up at your school, you may not use your title as an officer of the AAAOM-SOCC in any way when stating your opinion about a local issue. You may not invoke the AAAOM or AAAOM-SO in any attempt to get them involved in your local issue. Any questions about this should be directed to your SOC Contact

### **Use of AAAOM-SOCC title in Email/Communications**

Be aware that any communication you are making that includes your role in the AAAOM-SOCC may imply to the reader that you are speaking on behalf of the AAAOM or AAAOM-SO. **Unless expressly authorized to do so, you are not permitted to speak on behalf of these organizations.** Certainly, an internal email to your schoolmates about AAAOM/AAAOM-SO or AAAOM-SOCC business is an applicable time when you are authorized to speak as your role. Any other email/communication you make should not include your AAAOM-SOCC title/role as part of the communication, including in your signature. Any questions about the appropriateness of using your AAAOM-SOCC title/membership in a communication should be directed to your SOC Contact.

### **Appropriate use of AAAOM-SOCC funds**

Any use of AAAOM-SOCC funds must be voted on by a quorum of your membership, and must be approved as per the Voting Guidelines that are included in the SOCC Bylaws and listed above on p.

### **Just Cause for Removal of Student Officer, Student Member, or Faculty Advisor**

In the event that a student member has been involved in something unethical, they may be removed based upon "just cause." This includes, but is not limited to, indictment of criminal acts, moral turpitude, or lack of completion of their prescribed duties.

If you find your College Chapter involved in an ethical issue, contact your SOC Contact and let the AAAOM-SOC assist you in dealing with it. We can offer guidance based on our experiences with other issues at other schools.

The following are guidelines for voting to remove an officer/member/faculty advisor:

1. Removal of an officer must be done by a 2/3-majority vote from a quorum of the SOCC General Membership
2. Removal of student members, or liaisons must be done by a 2/3-majority vote from a quorum of the SOCC General Membership.