



CHIROCONGRESS

**POLICIES AND PROCEDURE
MANUAL**

Policies and Procedure Manual Adopted August 27, 2018

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ARTICLE I

OFFICERS AND DIRECTORS

SECTION 1: PRESIDENT

- A. As stated in the Bylaws the President shall conduct all meetings of the Congress of Chiropractic State Associations, hereinafter referred to as “ChiroCongress” and the Board of Directors.
- B. President shall appoint all committees, subject to the approval of the Board of Directors, within sixty (60) days after President’s induction into office.
- C. President shall be an ex-officio member of all committees and can cast the deciding vote in case of a tie.
- D. President may appoint task forces at any time during the year.
- E. President may appoint a Parliamentarian during the annual ChiroCongress meeting or during a Board of Directors meeting.
 - 1) The Parliamentarian shall rule on all questions of order and appeals.
 - 2) The Parliamentarian shall be governed by Roberts’ Rules of Order, revised in all cases not covered by the Bylaws.
- F. It will be the responsibility of the President to confirm that all state organizations are notified of meetings and activities of ChiroCongress.
- G. Upon completion of President’s term(s), they will serve as a voting member of the Board of Directors as the Immediate Past President.

SECTION 2: FIRST AND SECOND VICE PRESIDENTS

- A. Vice Presidents shall perform all functions and duties of the President in the absence of the President.
- B. These duties will be performed in order of office.
- C. Vice Presidents will perform duties as asked of them by the President and/or Board of Directors.

SECTION 3: SECRETARY

- A. The Secretary shall ensure minutes of each meeting held by ChiroCongress are recorded and maintained in permanent files.
- B. .
- B. Secretary shall ensure General Membership meeting minutes are made available to all members within sixty (60) days of adjournment.
- C. Secretary shall ensure copies of board meetings or executive committee meeting minutes are made available within ten (10) days of adjournment.
- D. Secretary shall ensure a proper membership file and list of delegates with current addresses is kept.
- E. Secretary shall ensure that all meeting notices of ChiroCongress are distributed to each state organization and their delegates a minimum of thirty (30) days prior to the date of the meeting.
- F. Secretary shall ensure retention of all minutes, books, papers, or any written records of property pertaining to ChiroCongress are in permanent storage, and will make the same available for inspection or examination, at all times, by the President or the Board of Directors, or any other member in good standing upon proper authorization by the President or the Board of Directors.
- G. Secretary shall be allowed the necessary expenses for the operation and function of their office as determined by the Board of Directors.
- H. Secretary will assume position of presiding officer in the absence or incapacity of the President and Vice Presidents.

SECTION 4: TREASURER

- A. The Treasurer is responsible for overseeing proper and up-to-date accounts on all receipts, monies, funds, securities and expenditures.
- B. The Treasurer shall be a member of the Budget Committee.
- C. The President, Treasurer, Executive Director and any employees handling funds shall be insured for commercial crimes at a level determined by the Board of Directors, but in no case less than an amount to protect ChiroCongress. The cost of the insurance will be borne by ChiroCongress, and a copy of the current insurance policy shall be supplied to the President by hard copy and in the ChiroCongress permanent records management system.
- D. The Treasurer shall furnish a complete report of all receipts and reimbursements to ChiroCongress at the annual meeting and at such other times as the Board of Directors may request.

- E. The records of the Treasurer shall be open to inspection, at any reasonable time, by any member upon proper authorization of the President and Secretary, or the Board of Directors vote.
- F. The Treasurer and Executive Director, in cooperation with the Secretary, shall notify all members of ChiroCongress of the dues and assessments no later than January 31.
- G. The Treasurer shall assume the financial responsibilities in the absence of the Executive Director.
- H. The Treasurer's name shall be listed on the bank accounts of ChiroCongress.
- I. The Treasurer will review the financial stability with Executive Director and Budget Committee following the Annual Business Meeting. Checking, savings and money market accounts shall be funded according to operating needs. If fund balances allow, the majority of unrestricted funds shall be held in an interest-bearing money market account until and unless funds are required from the money market account for operational purposes. All accounts shall be reconciled monthly.

SECTION 5: DISTRICT DIRECTORS

- A. The United States is divided into five (5) ChiroCongress districts as follows:
 - 1) DISTRICT ONE: Maine, New Hampshire, Vermont, Massachusetts, Connecticut, Rhode Island, New York, New Jersey, Pennsylvania, Delaware, Maryland, Washington DC.
 - 2) DISTRICT TWO: Ohio, Indiana, Michigan, Illinois, Missouri, Iowa, Wisconsin, Minnesota.
 - 3) DISTRICT THREE: Virginia, West Virginia, North Carolina, South Carolina, Georgia, Florida, Kentucky, Tennessee, Alabama, Mississippi, Arkansas, Louisiana, U.S. Virgin Islands, Puerto Rico.
 - 4) DISTRICT FOUR: Texas, New Mexico, Kansas, Colorado, Nebraska, Wyoming, Montana, North Dakota, South Dakota, Oklahoma.
 - 5) DISTRICT FIVE: Arizona Utah, Nevada, California, Oregon, Idaho, Washington, Alaska, Hawaii.
- B. Each district will caucus at the annual meeting and elect one member to represent their district as a member of ChiroCongress Board of Directors for the coming year. The outgoing director will serve as chairperson of the caucus.

C. Duties of the district directors are:

- 1) To act as a liaison between ChiroCongress office and the members of their respective district.
- 2) To coordinate a regional meeting (face to face preferred, but telephone conference or any other electronic form will be acceptable) of the organizations in their district.
- 3) To promote the goals and objectives of ChiroCongress to association leaders in their district, field questions from members, and bring ideas and issues of concern back to the Board of Directors.
- 4) To assist with keeping the ChiroCongress database for their district updated.
- 5) To actively recruit new ChiroCongress members from their district.
- 6) To recruit attendance at convention from the members in their district.
- 7) To perform other duties as assigned by the President or Executive Committee.

SECTION 6: AT LARGE DIRECTOR

A. The association executives will caucus at the annual meeting and elect one member to represent them as a member of the ChiroCongress Board of Directors for the coming year. The outgoing director will serve as chairperson of the caucus.

B. Duties of the At Large Director are:

- 1) To act as a liaison between ChiroCongress office and the association executives of all ChiroCongress member associations.
- 2) To provide input to ChiroCongress Board on all programs, policies, and decisions from the unique perspective of an association executive.
- 3) To coordinate a telephone conference of the association executives to discuss matters of common interest and concern.
- 4) To promote the goals and objectives of ChiroCongress to association executives, field questions from members, and bring ideas and issues of concern back to the Board of Directors.
- 5) To actively recruit new ChiroCongress members.
- 6) To serve on the Education and Events Committee and encourage all association executives to attend convention.
- 7) To perform other duties as assigned by the President or Executive Committee.

SECTION 7: IMMEDIATE PAST PRESIDENT

- A. Shall be a member of the Board of Directors with all rights and privileges.
- B. Shall act as advisor to the President.

SECTION 8: BOARD OF DIRECTORS

- A. Shall conduct all business of ChiroCongress between annual meetings.
- B. Shall act as an arm of the Budget Committee by auditing or having the ChiroCongress' financial books audited each year and assisting in the preparation of the calendar year budget.
- C. Shall have the right to inspect all records of any committee or officer and to call for financial or progress reports from such offices or committees, periodically.
- D. Shall attend two (2) face-to-face meetings of the board annually and shall be reimbursed for all travel costs associated with these meetings as outlined in the reimbursement policy. Face to face meetings include:
 - 1) The planning meeting in the spring.
 - 2) The annual conference in the fall.
- E. Shall participate in a minimum of two (2) conference call meetings during the year.
- F. Shall submit written reports as required for all meetings.
- G. Shall review all materials sent from the ChiroCongress office and respond in a timely manner.

ARTICLE II

STANDING COMMITTEES

SECTION 1: COMMITTEES

- A. Standing committees are as follows:
 - 1. Executive
 - 2. Membership
 - 3. Budget
 - 4. Bylaws
 - 5. Development and Endorsements
 - 6. Guidelines and Research
 - 7. Educations and Events
 - 8. Nominating
 - 9. Communications and Policy

- B. Each committee shall include at least one Board member. The Committee Chair may solicit additional individuals from member state associations. Committee members shall be approved by the President and ratified by the Board.
- C. Subcommittees within may be formed by the Chair to address special needs.
- D. All committee members shall comply with code of conduct, anti-trust, and confidentiality policies.

SECTION 2: GENERAL GUIDELINES FOR ALL COMMITTEES

- A. Committee work should be done in committee, outside of board meetings, unless agenda item is present.
- B. Written committee reports should be submitted to ChiroCongress office prior to a Board meeting at which a committee chairperson wishes to give a report.
- C. Minutes should be kept of all committee meetings and forwarded to the ChiroCongress office within ten (10) days after meeting; recorder should be designated by committee chairperson.
- D. Committees should meet as soon after planning session as possible to develop action steps and time table for accomplishing established goals.
- E. Action steps and time table should be submitted to the ChiroCongress office at least two (2) weeks prior to the Board meeting immediately following planning session.
- F. ChiroCongress office and President should be notified of time, place, etc., for all committee meetings and copied on all committee correspondence.
- G. Committees may not act unilaterally and must obtain board approval for planned projects involving ChiroCongress.

SECTION 2: EXECUTIVE COMMITTEE

- A. Members shall be President, First Vice President, Second Vice President, Secretary, Treasurer, Executive Director at Large and Immediate Past President.
- B. A meeting of this committee may be called by the President.
- C. This committee can act only when a quorum (a majority of the members) is present; its actions are subordinate to the Board of Directors.

SECTION 3: MEMBERSHIP COMMITTEE

- A. Responsible for validating all memberships, delegates, voting, and seating.
- B. The following process will be used to determine an applicant's eligibility for membership.
- To confirm an applicant's existence for two (2) or more years, the organization must submit Articles of Incorporation or other legal documents, i.e. bank statements.
 - To confirm that an applicant holds regular elections at least every three years and that an applicant's members pay annual dues, the organization must submit its Bylaws.
 - To confirm that an applicant has 100 members or 20% of that state's licensed Doctors of Chiropractic, whichever is less, and the organization must submit a membership list of in-state chiropractors. This list will not be distributed outside of ChiroCongress office, but the membership number will be verified by ChiroCongress staff and reported to the committee.
 - To review membership(s) and make recommendations to renew or revoke, when appropriate.
 - To review and determine annual dues amounts for each membership category.
 - To review all supporting member (vendor) memberships plans.

SECTION 4: BUDGET COMMITTEE

- A. Members shall be the Treasurer, the Executive Director and at least one Board members appointed by the President.
- B. Responsible for preparing an annual budget for approval by the Board of Directors and financial oversight over all ChiroCongress finances.
- C. Responsible for ensuring that ChiroCongress remains solvent and operates within the budget parameters.

SECTION 5: BYLAWS COMMITTEE

- A. Responsible for studying, analyzing, and recommending to ChiroCongress, any proposed changes in the Bylaws, whether initiated by this committee or according to ARTICLE VIII, Section 1, A., B., and C., of the Bylaws.

- B. Responsible for recommending interpretation of the Bylaws to the Board of Directors should questions or situations arise.

SECTION 6: DEVELOPMENT AND ENDORSEMENTS COMMITTEE

- A. Responsible for ensuring the continued success of programs that provide income to ChiroCongress.
- B. Responsible for developing new ideas and projects to diversify ChiroCongress income.
- C. Responsible for continued development of ChiroCongress member benefits.
- D. Responsible for making recommendations to ChiroCongress Board on endorsements.
- E. Responsible for evaluating products and services where ChiroCongress' name would appear as "approved by", "sponsored by" or "evaluated by".
- F. Responsible for making recommendations to the Board of Directors for validation of any agreement sought by a vendor for the use of ChiroCongress' name.
- G. This committee does not have the ability to unilaterally permit any member, vendor, or supplier to use ChiroCongress name without the Board of Directors specific approval by majority vote.
- H. All vendor members shall sign a ChiroCongress contract and adhere to the code of conduct policies.

SECTION 7: GUIDELINES AND RESEARCH COMMITTEE

- A. To act in the best interest of ChiroCongress Board and the chiropractic profession in matters relating to guidelines.
- B. The chair shall act as the liaison between ChiroCongress and Clinical Compass (CCGPP).
- C. The chair shall be responsible for training and coordination of the District Clinical Compass (CCGPP) elected representatives.
- D. The ChiroCongress District Clinical Compass (CCGPP) elected representatives will be members of this committee.

SECTION 8: EDUCATION AND EVENTS COMMITTEE

- A. Responsible for development of convention program.
- B. Responsible for assisting staff on-site with convention registration and logistics.

- C. One member of this committee should be a member of the association in the state where the annual meeting is being held.
- D. Responsible for development of ongoing educational events for state association members, i.e., Lunch + Learns, Roundtables, webinars, etc.
- E. Responsible for ChiroCongress awards programs acknowledging state association members and others.
- F. Responsible for any certification necessary for educational events, i.e., CAE or CE.

SECTION 9: NOMINATING COMMITTEE

- A. The President, with approval from the Board, will form the Nominating Committee. The Committee shall include four (4) board members, one of whom shall be the Immediate Past President of ChiroCongress as chair, one current Executive Committee member, one Executive Director member of the Board, and one Doctor of Chiropractic member of the Board.
- B. At least one member of the Nominating Committee shall be reappointed to the following year's Nominating Committee to insure continuity unless all are no longer members of the board.
- C. The Nominating Committee shall make recommendations to the President whenever a vacancy occurs.
- D. The Nominating Committee shall circulate to the membership a call for nominations for all available positions and provide the membership with a minimum of thirty (30) days to respond.
- E. The Nominating Committee shall submit to the Board, not later than sixty (60) days prior to convention, a slate of candidates for the positions of President, First Vice President, Second Vice President, Secretary, Treasurer, District Directors, At Large Executive Director and District Clinical Compass (CCGPP) representatives as necessary.
- F. The Nominating Committee report shall be circulated to the membership not less than thirty (30) days prior to convention.
- G. Elections will be held during the business meeting at the convention.

Candidates receiving the highest number of votes for each office shall be elected. In the case of a tie, balloting will take place a total of three times and if the tie cannot be broken, the result of the election will be decided by a vote of the executive committee. If there is only one candidate for each position, the secretary shall cast a unanimous ballot for the candidates put forth by the Nominating Committee.

- H. The Nominating Committee shall strive to insure diversity and representation of the full ChiroCongress membership on the Board.

- I. The Nominating Committee may suggest to the President a list of possible recommendations for the above positions to attend the mid-year planning retreat.

SECTION 10: COMMUNICATIONS AND POLICY COMMITTEE

- A. Develop an ongoing communications plan (internal/external) for ChiroCongress.
- B. Define all communication channels and approval paths for each.
- C. Responsible for developing and reviewing ongoing guidelines for use for all methods of member communications, (e.g., listserv, website, and social media posts).
- D. Responsible for the development of special communications related to legislative issues and concerns that impact the entire chiropractic profession.
- E. Will engage with other stakeholders with the profession to promote consistent dissemination of critical issue information.
- F. Is charged with providing tools and resources for states to educate state and national policymakers about current, critical issues.

ARTICLE III

EXECUTIVE DIRECTOR

SECTION 1: GENERAL DUTIES

The Executive Director shall serve as the communication hub for the officers, directors and members of ChiroCongress via:

- A. Publish and distribute ChiroCongress newsletters, minimum frequency of three times per year.
- B. Writing and overseeing fax and/or email broadcasts, minimum frequency monthly.
- C. Organizing teleconference calls.
- D. Developing and running annual ChiroCongress convention.
- E. Copying officers and directors on all relevant ChiroCongress correspondence.
- F. Maintaining contact with symbiotic chiropractic associations, groups and individuals.
- G. Maintaining an atmosphere of consensus, coordination and sharing among state associations by direct communications through letter, e-mail, faxes, and phone calls.
- H. Maintaining phone services to members.

SECTION 2: BOARD DUTIES

The Executive Director serves as the staff person to ChiroCongress officers, having communication work delegated or approved by the President, on behalf of the officers, directors and committee chairpersons, etc.

SECTION 3: FINANCIAL DUTIES

The Executive Director shall be the custodian of all funds, monies and securities of ChiroCongress and serves as the financial coordinator and overseer, ensuring that:

- A. ChiroCongress operates on budget.
- B. ChiroCongress raises funding for important projects and to offset expenses as needed to remain solvent.
- C. All bills are paid in a timely basis.
- D. All deposits are made in a timely basis in a reputable bank(s) approved by the Board of Directors. The names of the President, Treasurer and Executive Director of ChiroCongress will be listed on the account.
- E. Financial commitments are kept.
- F. Accurate bookkeeping and financial records are kept assuring an exact and permanent record of ChiroCongress income, expenses and account balances; these records are open to inspection, at any reasonable time, by any member upon proper authorization of the President and Treasurer.
- G. All membership dues are billed by January 31 and payments received within ninety (90) days.
- H. Shall furnish detailed and timely reports of all receipts, monies, funds, securities and expenditures of ChiroCongress to the Treasurer.
- I. ChiroCongress continues to develop sources of non-dues income such as endorsements and products and services to member associations or organizations.

SECTION 4: LEGAL DUTIES

The Executive Director oversees all necessary insurance, taxation, legal issues, expenses, paperwork, activities, and other operational needs:

- A. Reporting to the Internal Revenue Service in a timely manner.
- B. Maintaining appropriate ChiroCongress Directors and Officers Insurance.

- C. Handling any necessary legal inquiry.
- D. Responsible for documentation of physical assets and retention.

SECTION 5: SUPPORT DUTIES

The Executive Director serves as support staff to all projects as delegated and approved by the President, Executive Committee or Board of Directors, such as:

- A. Negotiating endorsement contracts and other agreements.
- B. Connecting interested individuals to information on national projects

ARTICLE IV

POLICY FOR CLINICAL COMPASS (CCGPP) REPRESENTATIVES – (COUNCIL OF CHIROPRACTIC GUIDELINES AND PRACTICE PARAMETERS)

SECTION 1: QUALIFICATIONS

- A. The representative of Clinical Compass (CCGPP) must be a member of a ChiroCongress member state organization or association.
- B. The representative shall meet the following criteria:
 - 1) Have an interest and commitment in development, dissemination, implementation and outcomes of practice guidelines and parameters.
 - 2) Have a minimum of five (5) years of relevant experience (clinical/academic/research).
- C. The representative should have the following attributes:
 - 1) Recognition in the chiropractic profession with a record of leadership in relevant activities.
 - 2) Broad view of public health issues.
 - 3) Demonstrated capacity to participate in a consensus process.
 - 4) Demonstrated capacity to respond to consumer needs.

SECTION 2: SELECTION PROCESS

- A. Each ChiroCongress District will elect a qualified Doctor of Chiropractic from their District to serve as their Clinical Compass (CCGPP) representative.
 - 1) Elections will be held at ChiroCongress annual meeting with odd numbered districts electing representatives in odd numbered years and even numbered districts electing representatives in even numbered years.
 - 2) Notification of a pending election should be sent to all member associations or organizations in the District at least thirty (30) days prior to the annual meeting.
 - 3) Any member association or organization may nominate a qualified doctor for the position.
 - 4) All nominees shall be advised of the responsibilities associated with the position and must signify acceptance of the nomination; acceptance of the nomination indicates their willingness to fulfill the responsibilities.
 - 5) Nominees shall be required to present their credentials for review by the members of their District at the annual meeting.

- B. ChiroCongress At-Large member of Clinical Compass (CCGPP) shall be selected by ChiroCongress Board of Directors in even numbered years and may serve only three (3) consecutive two-year terms.

- C. Representatives become ineligible if their state association or organization does not maintain a ChiroCongress membership, or, if they fail to attend two (2) consecutive Clinical Compass (CCGPP) meetings. In the event a vacancy occurs:
 - 1) Members in the respective District should be notified of the vacancy and asked to submit names for consideration by the Board.
 - 2) ChiroCongress Board of Directors will appoint a representative from the respective District to fill the vacant seat until the next annual meeting when the District can elect a new representative.
 - 3) ChiroCongress Executive Director is responsible for keeping ChiroCongress Board of Directors advised on the expiration of terms and eligibility of representatives and for notifying Clinical Compass (CCGPP) of any changes in representation.

SECTION 3: RESPONSIBILITIES

- A. To represent the views of ChiroCongress and District from which the representative is elected.
- B. To actively seek input from ChiroCongress and District represented.

- C. Responsible for keeping ChiroCongress Board of Directors and members informed on Clinical Compass (CCGPP) activities.
- D. Submit written reports following each Clinical Compass (CCGPP) Board meeting within twenty-one (21) days. If unable to attend a meeting, representative will secure meeting notes from another source for written report.

SECTION 4: TERMS OF OFFICE

- A. The term of office will be two (2) years.
 - 1) The odd numbered districts are voted in the odd numbered years.
 - 2) The even numbered districts are voted in the even numbered years.
- B. A maximum of three (3) consecutive terms may be served.

SECTION 5: CHIROCONGRESS SUPPORT

ChiroCongress will support these representatives on an as-available-basis for the following, provided reimbursement requests are received by ChiroCongress office within thirty (30) days after conclusion of meetings at ChiroCongress annual convention where the annual Clinical Compass (CCGPP) meeting is held:

- A. Expenses up to a maximum of one thousand dollars (\$1,000) per representative.
- B. Expenses include:
 - 1) Coach class airfare if made at least twenty-one (21) days in advance;
 - 2) Up to two (2) nights hotel.
 - 3) Taxi fare to/from airport to the hotel/meeting site.
- C. Additional expenses over one thousand dollars (\$1,000) will be reviewed and reimbursed by Board approval.

ARTICLE V

BOARD LIAISONS OR INVITED GUESTS

- A. The President may invite Board Liaisons or Guests to the mid-year planning meeting or the annual convention.

- 1) Any expense reimbursement to liaisons or guests must be approved by the Board.

ARTICLE VI

FINANCIAL PROCEDURES

SECTION 1: GENERAL

- A. The Board of Directors formulate financial policies, administer policies, and review operations and activities of the organization.
- B. The Treasurer of the Board has the responsibility for financial management.
- C. Current Board job descriptions will be maintained for all executive Board members, indicating financial duties and responsibilities.
- D. Financial duties and responsibilities must be separated so that no one person has sole control over cash receipts, disbursements, reconciliation of bank accounts, etc.
- E. Financial service providers will be reviewed annually.
- F. The Treasurer will maintain a current and accurate log of the chart of accounts.
- G. These policies and procedures will be reviewed annually by the Budget Committee.

SECTION 2: CASH RECEIPTS

- A. The Executive Director opens all mail addressed to ChiroCongress without a specific addressee.
- B. The receipt of checks or cash received in the mail or in person will be recorded by the Executive Director in the accounting system.
- C. The Executive Director will endorse checks received, copy or digitally scan checks and deposit endorsed checks either in person or via digital transmission to bank.
- D. The Executive Director will make all bank deposits in a timely manner.
- E. Documentation for all banking activities will be recorded and stored in virtual storage system.
- F. The Treasurer will receive and/or have access to all financial documents, accounting software, and bank statements for review with detail about each deposit.
- G. The Executive Director will process accounts receivable aging reports at least once per month to assure timely receipt of monies due ChiroCongress.

SECTION 3: CASH DISBURSEMENTS

- A. All invoices will be immediately forwarded to the Executive Director who will review them for mathematical accuracy, validity, conformity to the budget.
- B. Prior to payment, all invoices and checks over \$500 will be authorized by the Treasurer. Upon approval, the Executive Director will sign the checks. Salary checks and all other amounts under \$500 do not need pre-approval.
- C. Expenses related to a specific budget line item exceeding approved annual budget by 10% shall be approved by the Board of Directors.
- D. The Executive Director will code the invoice with the appropriate expense or other chart of accounts line item number.
- E. The Executive Director will prepare checks on an as needed basis.
- F. Authorized signers on ChiroCongress bank account(s) and credit card include the Executive Director, Board President, and the Treasurer.
- G. The Executive Director will process accounts payable aging reports at least once per month to assure timely payment of all invoices.

SECTION 4: CHECKS

- A. The Executive Director will be responsible for all blank checks.
- B. All checks will be signed by the Executive Director or Treasurer or Board President.
- C. Voided checks will have "VOID" written boldly in ink on the face and have the signature portion of the check torn out. Voided checks will be kept on file.
- D. In no event will:
 - 1) Invoices be paid unless approved by an authorized signer.
 - 2) Blank checks (checks without a date or payee designated) be signed in advance.
 - 3) Checks be made out to "cash," "bearer," "petty cash," etc.
 - 4) Checks be prepared on verbal authorization.

SECTION 5: BANK RECONCILIATIONS

- A. Bank statements shall be delivered directly to and opened by the Executive Director.
- B. The Executive Director shall insure that all bank statements are reconciled monthly.
- C. The Treasurer will be given copies of the bank statements in a timely manner.
- D. The Board of Directors will be given copies of the bank statements upon request.

SECTION 6: REIMBURSEMENTS

- A. Every Board member or employee's reimbursement or purchase request must be documented on an approved form. Allowable expenses defined as follows:
- i. Lodging – basic room allowance. An itemized receipt from the hotel detailing all charges, the person(s) for whom the lodging was provided, and the specific business purpose.
 - ii. Transportation – coach airfare purchased minimum of twenty-one (21) days in advance unless pre-authorized by Executive Director; mileage rate according to federal government standards or basic rental car utilization whichever less expensive; taxi transfers to/from venue.
 - iii. Meals – reimbursed based upon receipts not to exceed per diem allowance as defined by federal government for location/area.
 - iv. Other Expenditures - a receipt from the vendor detailing all goods or services purchased and the specific business purpose.
- B. The Executive Director reviews all requests for reimbursement and:
- i. Verifies expenditure and amount.
 - ii. Approves for payment if in accordance with budget.
 - iii. Provides or verifies appropriate allocation information.
 - iv. Verifies fund availability and compliance with approved budget before releasing payment.
 - v. Enters invoices into accounting software.
 - vi. Prints checks according to payment due dates.
 - vii. Affixes signature(s) and mails checks via USPS first class mail with appropriate documentation.
 - viii. Files backup documentation in the appropriate permanent filing system.
- C. Reimbursements to the Executive Director will be authorized by the President or Treasurer.

SECTION 7: PURCHASING

- A. All purchases over \$500 (with the exception of convention commitments) must be approved in advance by the Treasurer.
- B. All purchases over \$1000 (with the exception of convention commitments) must be approved in advance by the Treasurer and President.

SECTION 8: PROPERTY

- A. The Board President will ensure an inventory log is maintained; which shall list a description of ChiroCongress purchased property, date of purchase or acquisition, price or fair value of the item and its location.
- B. On an annual basis the Executive Director will take a physical inspection and inventory of all fixed assets, and reconcile with the depreciation schedule.
- C. The Executive Director will record all major equipment in the accounting system. Major equipment is defined as anything with a unit cost of \$500 or more and a useful life of more than one year. An entry will be made whenever property is disposed of or acquired.
- D. Depreciation is recorded at least annually. Depreciation is computed using the straightline method over the estimated useful lives of the related assets. Any impaired assets discovered during the inventory will be written down to their actual value.

SECTION 9: INSURANCE

- A. Reasonable, adequate coverage will be maintained to safeguard the corporation.
- B. The Executive Director will review insurance policies upon renewal.
- C. The Executive Director will maintain insurance policies in insurance files.

SECTION 10: CONTRACTS

- A. The Executive Director and President or Committee Chair will carefully review any contract outside of convention expenses proposed for adoption to ensure compliance with all financial and Bylaws provisions. The Executive Director will maintain originals of all contracts.
- B. The Executive Director will prepare financial reports of vendor contributions every month and provide them to the Board of Directors. It will be the responsibility of the Executive Director to ensure that all financial reports are current and submitted on time.
- C. The Executive Director will maintain all financial reports of vendor contributions on file.

SECTION 11: BUDGETS

- A. The Executive Director, Treasurer, and Budget Committee will prepare the proposed annual financial budget. The Board of Directors will consider the proposed budget for approval.
- B. The Treasurer will ensure that current and previous budgets are on file.
- C. The Board of Directors must approve changes in the budget should they exceed 15% of the entire budget.

SECTION 12: MONTH-END AND YEAR-END CLOSE OUT

- A. The Executive Director will review and process journal entries.
- B. At the end of each month and fiscal year end, the Bookkeeper or outside CPA shall review all balance sheet accounts including verification of the following balances: cash accounts match the bank reconciliations, fixed assets accounts reflect all purchases, write-downs and retirements, accounts receivable and payable accounts match outstanding amounts due and owed.
- C. At the end of the calendar year, the Bookkeeper or outside CPA shall prepare the annual 990 Return for Organization Exempt from Income Tax. The return shall be presented to the Executive Director, the Budget Committee, and the Board President for their review and approval. The Executive Director shall file the return with the Internal Revenue Service by the annual deadline.
- D. All other appropriate government filings including those required by the state tax board and attorney general's office shall be completed and filed with the appropriate agency.

SECTION 13: OTHER

- A. The Secretary of the Board shall ensure accurate minutes of all meetings of the Board of Directors and committees with assistance from each committee chair.
- B. The Treasurer will note all items in the minutes relating to finance and take appropriate action.
- C. Donations of goods and services will be separately accounted for.
- D. All financial records will be retained for the time specified according to IRS standards for financial records or as stated by State law for the location.
- E. \$500 limit on cash advance option to prepay convention and mid-year expenses.

ARTICLE VII

CHIROCONGRESS REPRESENTATIVES FOR THE SUMMIT

SECTION 1: VOTING REPRESENTATIVE

- A. The Congress of Chiropractic State Associations shall be represented by a voting representative to The Summit, appointed by ChiroCongress Board of Directors on an annual basis. The Representative shall:
 - i. be a current member of the ChiroCongress Board and a Doctor of Chiropractic.
 - ii. be present at the regularly scheduled meetings of The Summit. Should additional meetings be called, the attendance of the voting representative shall be determined by the Board.
- B. If Representative is unable to attend a regularly scheduled meeting of The Summit, the Executive Committee of ChiroCongress may appoint another individual to attend in lieu of the representative.
- C. The Representative shall provide reports to ChiroCongress Board on at least a monthly basis.
- D. The representative will work closely with the non-voting Summit Representative for ChiroCongress with weekly calls to foster communication and decision making that may affect ChiroCongress and The Summit.
- E. ChiroCongress will support these representatives on an as-available-basis for the following, provided reimbursement requests are received by the ChiroCongress office within thirty (30) days after completion of the meeting(s).
- F. Expenses shall be reimbursed according to the reimbursement policy.
 - i. Expenses up to a maximum of one thousand dollars (\$1,000) per trip.
 - ii. Expenses include:
 - a. Coach class airfare if made at least twenty-one (21) days in advance;
 - b. Up to two (2) nights hotel.
 - c. Taxi fare to/from airport to the hotel/meeting site.
 - iii. Additional expenses over one thousand dollars (\$1,000) will be reviewed and reimbursed only by Board approval.

SECTION 2: NON-VOTING REPRESENTATIVE

- A. A non-voting representative to The Summit shall be appointed by ChiroCongress Board on an annual basis.
- B. If the Representative is unable to attend a regularly scheduled meeting of The Summit, the Executive Committee of ChiroCongress may appoint another individual to attend in lieu of the representative.
- C. The non-voting Summit Representative shall be present at and participate in the regularly scheduled meetings of The Summit. Whenever special Steering Committee Round Table meetings are called, the Executive Committee shall vote on the attendance of the non-voting representative.
- D. The non-voting representative shall to work closely with the voting Summit Representative with weekly calls to foster communication and decision making that may affect ChiroCongress and The Summit.
- E. ChiroCongress will support these representatives on an as-available-basis for the following, provided reimbursement requests are received by ChiroCongress office within thirty (30) days after completion of meeting(s).
- F. Expenses shall be reimbursed according to the reimbursement policy.
 - i. Expenses up to a maximum of one thousand dollars (\$1,000) per trip.
 - ii. Expenses include:
 - a. Coach class airfare if made at least twenty-one (21) days in advance;
 - b. Up to two (2) nights hotel.
 - c. Taxi fare to/from airport to the hotel/meeting site.
 - iii. Additional expenses over one thousand dollars (\$1,000) will be reviewed and reimbursed only by Board approval.

ARTICLE VIII

POLICY FOR DELEGATION OF CHIROCONGRESS REPRESENTATIVES

SECTION 1: INTRODUCTION

From time to time, and as the need arises, ChiroCongress will require a representative(s) to be delegated to represent ChiroCongress and its Board of Directors at specific events or functions. These representatives will be authorized and selected based upon the following guidelines.

SECTION 2: QUALIFICATIONS

- A. The representative must be a member or employee of a ChiroCongress member state organization or association.
- B. The individual shall meet the following criteria:
 - 1) Have an interest and commitment to the development of ChiroCongress and to the greater good of the chiropractic profession as a whole.
 - 2) Have a minimum of five (5) years relevant leadership experience.

SECTION 3: SELECTION PROCESS

- A. Members of ChiroCongress' Board of Directors will put forth suitable candidates for vetting. All nominees shall be advised of the responsibilities associated with the position and must signify acceptance of the nomination; acceptance of the nomination indicates their willingness to fulfill the responsibilities.
 - 1) Elections by the Board of Directors will either be by voice vote or electronic ballot with a majority vote required for election. ChiroCongress Board of Director members may not vote in elections for which they are a candidate.
- B. Representatives become ineligible if their state association or organization does not maintain ChiroCongress membership, or, if they fail to attend two (2) consecutive meetings for which they are appointed as representation.

SECTION 4: RESPONSIBILITIES

- A. To represent the views of ChiroCongress.
- B. To actively seek input from ChiroCongress.
- C. Responsible for keeping ChiroCongress Board of Directors and members fully informed on activities and events which they attend. No representative of

ChiroCongress shall agree to withhold information from the Board. Confidential information can be withheld from the general membership as necessary.

- D. Submit written reports as requested by the President or Board of Directors within twenty-one (21) days.

SECTION 5: CHIROCONGRESS SUPPORT

ChiroCongress shall support these representatives on an as-available-basis for the following, provided reimbursement requests are received by the ChiroCongress office within thirty (30) days after completion of the meeting or event:

- A. Expenses up to a maximum of one thousand dollars (\$1,000) per representative.
- B. Expenses include:
 - 1) Coach class airfare if made at least twenty-one (21) days in advance;
 - 2) Up to two (2) nights hotel cost.
 - 3) Taxi fare t/from airport to the hotel/meeting site.
- C. Additional expenses over one thousand dollars (\$1,000) will be reviewed and reimbursed only by Board approval.

ARTICLE IX

INVESTMENT PROCEDURES

SECTION 1: INTRODUCTION

This statement of Investment Policy has been adopted by the Board of Directors of ChiroCongress to provide guidelines for the investment of funds.

For the purposes of managing investment risk and optimizing investment returns within acceptable risk parameters, funds held by ChiroCongress will be divided into two separate financial pools. The two financial pools shall be called "Operating Fund" and "Reserve Fund".

With the exception of the Reserve Fund, it is not the policy of ChiroCongress to build cash reserves for reasons of investment purposes other than proper execution of its mission. Membership dues are fully intended to be used in pursuit of ChiroCongress' vision, mission and goals. Nevertheless, business operating cash needs can vary providing the opportunity for ChiroCongress to hold cash at varying maturities and thus maximize returns.

The purpose of the Operating Fund is to provide sufficient available cash to meet the routine day-to-day financial obligations of all operations of ChiroCongress in a timely manner.

The purpose of the Reserve Fund is to provide financial stability to the organization. The establishment of a Reserve Fund is an essential part of the financial management of ChiroCongress. Building reserves is a sound business practice as well as a way for saving for major capital purchases, ensuring that funds will be available for special programs, and having funds available in the event of special emergencies, a major downturn in the economy or other contingencies.

SECTION 2: INVESTMENT PROCEDURES

A. The following procedures will be followed to ensure the investment policy statement is consistent with the current mission of ChiroCongress and accurately reflects current financial condition:

- 1) This investment policy shall be reviewed annually by the Budget Committee, which will recommend any necessary revisions to the Board of Directors.

B. The following procedures will be used to determine the dollar amounts to be placed in the Reserve fund.

Reserve Fund

- 1) Annually, the Budget Committee will recommend to the Board of Directors, the dollar amount to be placed in the Reserve Fund.
- 2) Normally, the Board of Directors will approve additions to and withdrawals from the Reserve Fund on an annual basis or as needed for special projects.

C. It is anticipated that an Investment Advisor may be sought to manage that portion of funds held in the Reserve Fund. The Budget Committee will recommend the selection of an Investment Advisor to the Board of Directors.

D. It is anticipated that mutual funds of varying investment objectives may be sought to manage portions of ChiroCongress' funds. The following procedure shall be used for the selection of such funds.

- 1) The Budget Committee, in consultation with the Investment Advisor and the ChiroCongress' Executive Director, shall determine a periodic asset allocation of the funds set aside for investment. The asset allocation shall be based on a thorough review and discussion of the associated risks the Budget Committee,

on behalf of ChiroCongress, determines appropriate with due regard to the mission. A thorough discussion of appropriate investment objectives shall be reviewed and a targeted rate of return shall be identified to best meet objectives. Recommendations by the Investment Advisor shall be reviewed and approved by the Budget Committee.

- 2) It is anticipated that the Budget Committee shall meet from time to time with the Investment Advisor to review the objectives and to be kept informed about trends in the economy, and in the financial markets. It is recognized that market shifts may require the Investment Advisor to recommend rapid changes in market position. These changes shall be handled by a Budget Committee conference call set up by the Executive Director or the Treasurer who is chairperson of the Budget Committee. All such changes shall be by a majority agreement by members of the Budget Committee.

SECTION 3: INVESTMENT PURPOSES AND OBJECTIVES

A. OPERATING FUND

Purpose

The purpose of the Operating Fund is to provide sufficient available cash to meet the financial obligations of ChiroCongress in a timely manner.

Investment Objectives

The investment objectives are:

- i. Preservation of capital;
- ii. Liquidity;
- iii. To optimize the investment return within the constraints of (i) and (ii) above.

Allowable Investments

The Operating Fund may be invested as follows:

- i. Interest bearing checking, savings and money market accounts in federally insured banks or credit unions not to exceed federally insured amounts;
- ii. Federally insured Certificates of Deposit not to exceed \$100,000 per institution with maturity of sixty (60) days or less.

Maturity

The maturities on investments for the Operating Fund shall be limited to sixty (60) days or less. The Executive Director shall be responsible for scheduling maturities in relationship to cash flow requirements.

Reporting

The Executive Director shall include information in the monthly financial report to the Board of Directors, which includes a schedule of investments, interest income year to date and current yield.

B. RESERVE FUND

Purpose

The purpose of the Reserve Fund is to provide financial stability and to enhance the purchasing power of funds held for future expenditures. Additions to or withdrawals from this fund must have prior approval of Board of Directors.

Investment Objectives

The objectives of the Reserve Fund should be pursued as a long-term goal designed to maximize the returns without exposure to undue risk. It is understood that fluctuating rates of return are characteristic of the securities markets. The greatest concern should be long-term appreciation of the assets and consistency of total portfolio returns. Recognizing that short-term market fluctuations may cause variations in the fund performance, the expectations of the fund will be to achieve the following objectives over a three (3) to five (5) year period:

1. The portfolio's total return should exceed the increase in the Consumer Price Index by 2% per year.
2. The portfolio's total return should exceed the increase in the Treasury Bill Index by 1% per year.
3. The portfolio should be invested to minimize the likelihood of low negative total returns, defined as a one-year return worse than negative 5%.

Investment Guidelines

The investment policies and restrictions presented in this statement serve as a framework to achieve the investment objectives at a level of risk deemed acceptable. These policies and restrictions are designed to minimize interfering with efforts to attain overall objectives. The Budget Committee, in consultation with the Executive Director and the Investment Advisor has broad responsibility, with Board approval, to shift the commitment of assets among assets classes and maturities within the constraints of this Investment Policy.

Fixed Income

Investment in fixed income securities shall be managed actively to pursue opportunities presented by changes in interest rates, credit ratings, and maturity premiums. The investments may be selected from U.S. corporate debt securities and obligations of the U.S. Government, its agencies and instrumentalities. These investments will be subject to the following limitations:

1. The weighted average maturity of the portfolio must be five (5) years or less.
2. Investments in securities of a single issuer (with the exception of the U.S. Government and its agencies) must not exceed 10% of the portfolio at cost.

Equities

The part of the portfolio invested in stock mutual funds should be representative of the overall stock market. The objective of the stock portfolio is to equal or surpass the S & P 500 Index (net of expenses) over a five (5) year period.

Prohibited Investments

The following investments are prohibited:

1. Any securities issued by companies that knowingly discriminate against a protected class;
2. Letter stock;
3. Options, except in mutual funds;
4. Commodity or futures trading, except in mutual funds where the trading objective is to preserve principal;
5. Short selling;
6. Margin transactions;
7. Foreign bonds and stocks, unless the bonds are dollar denominated.
8. Private placements.

Reporting

The Executive Director shall prepare a report to the Budget Committee on a semi-annual basis. The report shall contain a schedule of holdings, asset class percentages, and performance compared to the objectives. The Budget Committee shall review the report, present the report to the Board of Directors and make recommendations for change.

ARTICLE X

CONVENTION LOCATION SELECTION

SECTION 1: MEMBERSHIP INPUT

During the Annual Meeting, Districts shall discuss future meeting locations during their caucus and present three (3) locations to the body at large. Each year the locations will be nominated based upon rolling criteria of: Eastern US, Central US, and Western US. Based upon the nominations, three (3) locations will be selected by voice vote of the membership.

SECTION 2: CITY LOCATION DETERMINATION

The Executive Director assesses the proposed city locations and makes the final location determination for convention. The Executive Director shall seek input and advice from the Education and Events Committee concerning the proposed locations. The final determination shall be based upon cost and ease of travel for the membership, the availability of suitable facilities in which to hold the annual meeting, and held in a location which has a ChiroCongress member at the time of location selection

SECTION 3: SITE DETERMINATION

When a city location has been determined, the Executive Director shall explore potential sites. Potential sites shall be vetted by the Executive Director as necessary. The final site selection will be made by the Executive Director based upon ease of travel, total cost, and amenities available. The Education and Events Committee will be presented with location details for approval prior to engaging in contracts by the Executive Director.

ARTICLE XI

AUTOMATED MAILING LIST MANAGEMENT SERVICE (LISTSERV)

SECTION 1: INTRODUCTION

ChiroCongress shall maintain and operate an automated mailing list management service to foster communications between the membership. The service shall not be utilized for non-ChiroCongress marketing purposes and all proprietary information/data that members have access to shall not be used for other marketing purposes or sold/shared with others.

SECTION 2: SERVICE MEMBERSHIP

- A. Service membership is to be limited to the leadership of the member state associations including executive directors. ChiroCongress recommends that this leadership should include current President, and President- Elect/Vice President, or others approved by the ChiroCongress' Executive Director.
- B. Service membership is a no-cost member benefit of ChiroCongress.
- C. Service membership can be revoked from individuals who submit inappropriate content, or use content from the listserv inappropriately, at the discretion of the moderator.

SECTION 3: MODERATION

- A. The President shall appoint a member of the Board of Directors to act as moderator for the service membership.
- B. The moderator shall review all submissions to the service for suitable content before granting approval to be posted.
- C. The moderator shall maintain a thorough understanding of the federal Anti-Trust Regulations, and when unsure of the suitability of content shall deny posting of the content.

SECTION 4: CONTENT

- A. No digital or social media content shall be posted that violates any Anti-Trust regulations.
- B. Content will be of general interest to the membership at large and will not serve as a message board between individual members.
- C. The moderator shall maintain an unbiased and non-partisan position.

ARTICLE XII

EXECUTIVE SESSIONS

SECTION 1: INTRODUCTION

An executive session of the board may be called by the presiding officer under the following circumstances:

- (a) on the advice of counsel,

- (b) to discuss current pending legal matters,
- (c) to consult with the auditors and compensation consultants,
- (d) to acquire or dispose of property,
- (e) to discuss or act on personnel issues, or
- (f) to address such other matters as the board deems appropriate.

At the option of the presiding officer, or upon majority vote of the directors, an executive session of the board may be called.

SECTION 2: ATTENDANCE

- A. While in executive session, only Board members and individuals invited by the presiding officer may be present. At the option of the presiding officer, the Executive Director may be excused. Board members may discuss the business conducted in an executive session only with other Board members including or not including the Executive Director as directed by the presiding officer, persons present in the executive session by invitation of the presiding officer, and others upon advice of counsel. Those present shall be reminded that the executive session deliberations and minutes are confidential.
- B. Whenever possible, executive sessions shall be coordinated in advance and listed in the regular meeting agenda. The meeting agenda should identify executive session participants, including any non-board members.

SECTION 3: SUBJECT/DISCUSSION

The presiding officer should facilitate the conversation so that the issue at hand gets addressed during the executive session. Executive sessions should be for discussion, negotiation, and in some instances, decision making. When the purpose of the executive session has been accomplished, the regular board meeting resumes.

SECTION 4: MINUTES OF THE EXECUTIVE SESSION

- A. If the session is an informal discussion, detailed minutes may not be necessary, but the general substance of the executive session itself should be noted. If the session contributed to a board decision about a difficult or important issue, minutes may be necessary. Executive session minutes should be shared only with participants and should not be attached to the regular board meeting minutes. Any confidential documents distributed for an executive session should be clearly marked as

confidential and maintained by the Executive Director and/or the Board presiding officer.

- B. Board Meeting Minutes. The regular board meeting minutes should indicate when the board went into an executive session, what the primary reason was, any formal decisions that were made in executive session, and when the board came out of executive session.

SECTION 5: INFORMING THE EXECUTIVE DIRECTOR

After an executive session without the Executive Director, the presiding officer should immediately summarize the substance of the executive session.

LOG OF ACTIONS

- This document approved by the Congress Board of Directors on November 9, 2000 in Ft. Lauderdale, FL.
- This document amended by the Congress Board of Directors on November 8, 2001 in Albuquerque, NM.
- This document amended by the Congress Board of Directors on March 19, 2005 in Kiawah Island, SC.
- This document amended by the Congress Board of Directors on November 2, 2005 in San Francisco, CA.
- This document amended by the Congress Board of Directors on November 8, 2006 in Baltimore, MD.
- This document approved by the Congress Board of Directors on March 5, 2011 in Dallas, TX.
- This document approved by the Congress Board of Directors on April 6, 2013 in Daytona Beach, FL.
- This document approved by the Congress Board of Directors on April 26, 2014 in Portland, OR.
- This document approved by the Congress Board of Directors on November 6, 2014 in New Orleans, LA.
- This document approved by the Congress Board of Directors on April 11, 2015 in Delafield, WI.
- This document approved by the Congress Board of Directors on November 11, 2015 in Charleston, SC.

- This document approved by the Congress Board of Directors on November 9, 2016 in Litchfield, AZ.
- This document approved by the ChiroCongress Board of Directors on August 27 2018 via Zoom conference call.