



Illinois Physical Therapy Political Action Committee

Bylaws

Policies & Procedures

Adopted May 2010; Revised Nov 2011.
Revised September 2019
Reviewed and approved November 2020



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FOREWORD

The legislative decisions of our elected officials greatly influence the manner in which physical therapy services are delivered in Illinois. The Illinois Physical Therapy Association (IPTA) and Illinois Physical Therapy Political Action Committee (IPT-PAC) work in concert to educate our legislators on issues vital to the PT profession and ask for their support on key legislative initiatives.

The information contained in the IPT-PAC Bylaws, Policies & Procedures manual will help you understand the PAC, how it operates, and the vital role IPTA members play in the process.

Thanks for your commitment to the growth of IPT-PAC and the advancement of the physical therapy profession.

Colleen Flannery
Executive Director, Illinois Physical Therapy Association

Jim C. Milder, PT Chair, IPT-PAC Board of Trustees () (2016-present)

History of IPTA's Political Action Committee

In 1983, under the leadership of IPTA President Robert Babbs, Jr., the Board of Directors voted to form a political action committee. The application to form Illinois Physical Therapy Political Action Committee (IPT-PAC) was filed with the Illinois State Board of Elections. The IPTA Board of Directors appointed Joseph Burger as the first chair and Don Jackson as first treasurer. The beginning balance in the IPT-PAC was \$1,000, and of that, \$500 was contributed by the Eastern District.

Since its formation, the IPT-PAC has contributed financial support to numerous state leaders who share in IPTA's vision for better health care in Illinois.

Recent PT-PAC Chairs

1995-2000	Susan L. Suria
2000-2002	James C. Milder
2002-2004	Rick Rausch
2004-2008	William McGehee
2008-2015	Mike Riley
2016-present	Jim C. Milder

The Political Action Committee of the Illinois Physical Therapy Association (IPTA)

Official Bylaws

Article I – Name

The name of the political action committee shall be the Illinois Physical Therapy Political Action Committee (IPT-PAC). The name will also be abbreviated as IPT-PAC when permissible under Illinois law.

Article II – Principal Office and Location

The principle office shall be the Illinois Physical Therapy Association's headquarters (referred to as Illinois Chapter Office).

Article III – Affiliation

IPT-PAC is affiliated with the Illinois Physical Therapy Association (IPTA), but is not affiliated with any political party.

Article IV – Purpose

The purpose of IPT-PAC is to promote, solicit, facilitate, receive, and accumulate voluntary contributions to be distributed for political expenditures to the campaign, political, and leadership committees of candidates for political offices who have demonstrated an understanding, interest, and commitment in the views, goals, and initiatives promoted by IPT-PAC and IPTA. To the extent necessary to achieve its purpose, IPT-PAC may also educate physical therapists, physical therapist assistants, student physical therapists, student physical therapist assistants, and other supporters of the profession about the political process and encourage their participation through outreach and advocacy efforts.

Article V – Regulation

The IPT-PAC is registered with the Illinois State Board of Elections and is empowered to act as a political action committee in accordance with Illinois election laws governing campaign finance and other legislation as may from time to time be enacted in this regard.

Article VI - Separate Segregated Fund

All contributions to IPT-PAC shall be maintained by IPT-PAC as a separate segregated fund in one designated campaign depository, and expenditures by IPT-PAC in support of any candidate, political or leadership committee shall be made from this depository.

Article VII – Reporting

IPT-PAC shall submit a report at to at least once annually and as appropriate to the IPTA Board of Directors.

IPT-PAC will comply with all reporting requirements of the Illinois State Board of Elections.

Article VIII – Operating Policies and Procedures

PT-PAC shall establish operating policies and procedures. These policies and procedures may be amended, rescinded, or adopted from time to time by a majority vote of the IPT-PAC Board of Trustees. The operating policies and procedures require annual review and approval by the IPTA's Board of Directors.

Article IX – IPT-PAC Board of Trustees

The IPT-PAC is governed and directed by a Board of Trustees. IPT-PAC Board of Trustees shall consist of five (5) members other than student physical therapist and student physical therapist assistant members of IPTA recommended by the IPTA President and approved by the IPTA Board of Directors to each serve a term of three (3) years. All terms end on December 31st. No more than one (1) IPTA Board of Directors' member may serve on the IPT-PAC Board of Trustees at any given time. The IPTA President cannot serve on the IPT-PAC Board of Trustees. The trustee with seniority shall Chair the Board of Trustees. When two (2) trustees are senior, the trustees shall select the Chair. The trustees shall annually select the Treasurer for a term of one (1) year.

Article X – Organizational Structure

The IPTA's Executive Director shall be the administrative manager of IPT-PAC.

Article XI - Fiscal Year

The fiscal year of the IPT-PAC shall be January 1 to December 31.

Article XII - Adoption and Amendments

The bylaws may be adopted, amended or rescinded by the IPTA Board of Directors.

Article XIII – Dissolution

IPT-PAC may be dissolved at any time by a 3/4th vote of the IPTA Board of Directors. All remaining assets of the IPT-PAC in the event of dissolution after all debts have been paid will be disposed of in the matter provided in applicable state/federal regulations.

Article XIV - Procedure

The rules contained in the most recent edition of Robert's Rules of Order shall provide the rules of procedure for the IPT-PAC where they are not inconsistent with the provisions of these bylaws, or any formation document or resolution subsequently adopted by the IPTA Board of Directors or applicable law.

Adopted by the Illinois Physical Therapy Association's Board of Directors this 22nd day of May, 2010.

Revised by the Illinois Physical Therapy Association's Board of Directors the 12th day of November, 2011.

Sandra J. Levi, IPTA President
Jeannette Elliot, IPTA Secretary

Revised by the Illinois Physical Therapy Association's Board of Directors the 24th day of September, 2019

Mike Riley, IPTA President
Jeff Damaschke, IPTA Secretary

Reviewed and approved by the Illinois Physical Therapy Association's board of Directors the 10th day of November, 2020

Mike Riley, IPTA President
Jeff Damaschke, IPTA Secretary

Operating Policies and Procedures

Section I: Purposes of IPT-PAC and its Relationship with IPTA's Advocacy Efforts

IPT-PAC's purpose and mission is to educate, empower, and engage physical therapists, physical therapist assistants, and students of physical therapy in the legislative and political process. IPTA members' active is critical to advance physical therapy, its role in the continuum of health care, and its value to the patients physical therapists, physical therapist assistants, and students of physical therapy serve. IPT-PAC is IPTA's primary mechanism that allows the physical therapy profession to channel its financial and grassroots support to help candidates for state office who are responsive to the physical therapy profession's mission and goals. IPT-PAC provides visibility and opportunities for IPTA legislative and regulatory initiatives with state government leaders and their staff. Furthermore, IPT-PAC allows IPTA members the opportunity to speak as one voice to support members of state government advocating to advance physical therapy.

IPT-PAC maintains a close relationship with IPTA. IPT-PAC provides crucial support to IPTA's Government Affairs Department to achieve its legislative and regulatory agenda and to enhance its profile in Springfield.

Section II: Meetings

The IPT-PAC Board of Trustees shall conduct no less than one official meeting per calendar year. This official meeting shall coincide with the annual Assembly of Representatives or another annual meeting of the IPTA. During each election cycle, the IPT-PAC Board of Trustees may meet for an additional official meeting to discuss the budget for projected disbursement/contributions to state candidates for that election cycle. Additional meetings and conference calls may be called at the discretion of the Chair.

All meetings shall be led by the Chair of IPT-PAC and include only IPT-PAC Board of Trustee members, IPTA staff, and IPTA Board of Directors. Any guests not part of the above list must be approved by a majority vote of the IPT-PAC Board of Trustees. The administrative manager of IPT-PAC will serve in the role of secretary and submit a written report of all official meetings to the IPTA Board of Directors for consideration at the next Board meeting.

A quorum shall consist of three (3) of the IPT-PAC Board of Trustees. Where a vote is required, Trustee Members may cast votes in person, electronically, or by proxy.

Section III: Contributions/Disbursements

IPT-PAC supports friends of physical therapy in Illinois government by providing contributions/disbursements to their campaign, political or leadership committees to obtain or remain in elected office. The criteria for contributions/disbursements include, but are not limited to, the following:

- The candidate's support, position, and/or voting record on quality health care issues, including the role, recognition, representation, and reimbursement of physical therapists.

- The candidate's relationship to an IPTA member.
- Formal recommendation by an IPTA member, IPTA staff or IPTA lobbyist.
- The candidate's leadership position, committee assignment, and incumbency, including his/her likelihood to hold a position in the future.
- The candidate's opponent, his/her record on these criteria, and the nature and strength of this opposition.
- The candidate's likelihood for success/election to state office.
- The candidate's party affiliation (majority/minority).
- Bipartisan support of the major political parties.

IPT-PAC may use funds for reasonable and customary expenses associated with fundraising, communications, legal and lobbying services including travel expenses of any person for the purpose of fulfilling political, governmental, or public policy activities.

Section IV: Compliance with State Election and Campaign Laws

IPT-PAC upholds the highest standards of compliance for state election and campaign laws and regulations.

Contributions are subject to state-regulated limits.

Section V: Contributions/Distributions Requested by IPTA Members

The IPT-PAC Board of Trustees, in an effort to solidify the relationship between IPTA members and elected officials, recognize the value of political contributions/distributions being made by IPTA members in the jurisdiction the elected official represents. To meet this objective, an IPTA member may request a contribution/distribution on behalf of a candidate for state office by submitting the *Member Disbursement Request Form* to IPTA's Executive Director. The Contribution Request Form will be available for IPTA members on the IPTA website through the Chapter office. The decision regarding contributions and disbursements will be made by the IPT-PAC Board of Trustees, in accordance with the criteria for contributions/disbursements for candidates for state office and in consultation with the IPTA's designated lobbyist. IPTA members will be notified of the approval or denial of their requests within 7 calendar days. IPTA members may appeal denied requests to the IPTA's President. The decision made by IPTA's President is final. An annual record of approved and denied requests will be submitted to the IPTA Board of Directors annually. Distributions of funds will be approved with a majority vote of the IPT-PAC Trustees.

Section VI: Contributions to Candidates for Local Offices

IPT-PAC does not contribute to other state PACs and APTA components.

Section VII: Annual Audit

IPTA's President shall annually appoint 3 IPTA members to conduct a peer audit of the IPT-PAC. This report shall be submitted to the IPT-PAC Board of Trustees once per year.

Section VIII: Annual Contributions/Disbursements Budget

IPT-PAC will on an annual basis draft a working budget to guide its contributions/distributions within the established criterion. This budget will address benchmarks for party distribution, campaign to leadership committee ratios, percentage to be contributed/distributed by IPTA members locally, and other objectives for achieving the goals of IPT-PAC. At the beginning of each election cycle, IPT-PAC may dedicate one of its official meetings to setting these benchmarks and the operating budget.

Section IX: Relationship to PT-PAC (APTA)

PT-PAC is the American Physical Therapy Association's Physical Therapy Political Action Committee. PT-PAC does not maintain a legal or operational relationship with the political action committee (PAC) of any APTA component.

Section X: Finances/Banking/Investments

IPT-PAC has one bank account. Individuals that are authorized to sign checks issued by IPT-PAC are the IPTA Executive Director and the IPT-PAC Treasurer. No checks can be signed without the authorization of both the IPT-PAC Chairman and the IPT-PAC Treasurer. Once a month the IPTA staff will review the bank account and provide a bank reconciliation report.

Section XI: IPT-PAC Contributor Clubs

Platinum Club (annual)

- Unencumbered contribution greater than \$2,000 in a calendar year
- Contributor receives thank you letter and Platinum Club pin
- Contributor receives complimentary registration to IPT-PAC events
- Contributor's name is published at conferences.

Gold Club (annual)

- Unencumbered contribution totaling between \$1,000 or \$1,999 in a calendar year
- Contributor receives thank you letter and Gold Club pin
- Contributor's name is published at conferences.

Silver Club (annual)

- Unencumbered contributions of \$500-\$999 in a calendar year
- Contributor receives thank you letter and Silver Club pin
- Contributor's name is published at conferences

Bronze Club (annual)

- Unencumbered contributions totaling between \$250-\$499 in a calendar year
- Contributors receive thank you letter and Bronze Club pin

Contributor's name is published at conferences.

PT Club (annual)

- Unencumbered contribution totaling between \$100-\$249 in a calendar year
- Contributors receive thank you letter and PT Club pin
- Contributor's name is published at conferences.

Student Club (annual)

- Unencumbered contribution totaling at least \$20 in a calendar year
- Contributors receive thank you letter and Student Club pin
- Contributor's name is published at conferences.

Section XII: Restrictions on the Acceptance of Donations

The IPT-PAC cannot accept any donations while the office of either IPT-PAC Chair or IPT-PAC Treasurer is vacant. The IPT-PAC must comply with all regulations and limitations imposed by the Illinois State Board of Elections with regard to acceptance of contributions.

Role and Job Description of IPT-PAC Board of Trustees

Job Description – Chairperson

- The Chairperson will set the agenda and preside over each official IPT-PAC meeting and conference call.
- The Chairperson will consult with IPTA staff and the IPTA President on the leadership and management of the political action committee.
- The Chairperson, in conjunction with IPTA staff and the IPTA President, will report to the IPTA Board of Directors on IPT-PAC operations and activities, including an annual report and the minutes of each official meeting.
- The Chair and Treasurer must authorize all expenditures.
- In addition, the Chairperson will meet the job description for the Board of Trustees.

Job Description – Treasurer

- The Treasurer will review and provide financial reports to the IPT-PAC Chair at least quarterly and when otherwise requested.
- The Treasurer may sign checks in the absence of the Executive Director, but not without authorization of the Chair.
- The Treasurer will consult with IPTA staff and the IPTA President on the financial management of the political action committee.
- The Chair and the Treasurer must authorize all expenditures.
- In addition, the Treasurer will meet the job description for the Board of Trustees.

Job Description - Board of Trustees

- Each Trustee will take primary responsibility for recruitment and retention of donors to IPT-PAC, including but not limited to club level participation.
- Each Trustee will become familiar with the rules and regulations governing political action committees, primarily through the Illinois State Board of Elections.
- During the IPTA Assembly of Representatives and the annual IPTA conference, Trustees will staff the IPT-PAC booth/table for the purposes of fundraising and member education on IPT-PAC.
- Each Trustee will advance the agenda of IPT-PAC through participation in district meetings, conference calls, and activities in support of IPT-PAC.
- Each Trustee will mentor leaders and potential future trustees in fundraising and PAC acumen and management.

- Each Trustee will be a resource for IPTA's Districts regarding political advocacy.

Roles and Responsibilities

- Maintain active membership in IPTA.
- Contribute on an annual basis to IPT-PAC at least at the PT club level.
- Identify prospective club level participants among IPTA members.
- Identify fundraising strategies to meet the target contribution goals of IPT-PAC.

**Illinois Physical Therapy – Political Action
Committee
Contribution/Disbursement Request Form**

IPTA Member Name: _____

Date of Request: _____

Recommendation For:

Candidate: _____

Office/Committee: _____

Amount Requested: _____

Event & Date: _____

Race Information

Candidate Status: _____ Incumbent _____ # of Terms
_____ Challenger _____ Current Office
_____ Open Seat

Likely Opponent: _____

Record of Support for Physical Therapy and Health Care Issues

Current Cosponsor of State Legislation:

Current Support of State Issues:

Send this Form to: _____ Executive Director, Illinois Physical Therapy Assn
cflannery@ipta.org
phone: 630.904.0101

Office Use Only: Approved: _____ Yes _____ No
 Appeal Requested: _____ Yes _____ No
 Appeal Approved: _____ Yes _____ No
 Check Issued: _____
 Check Mailed: _____
 To: _____

IPT-PAC Frequently Asked Questions

Does IPT-PAC give preference to one political party over another in disbursing funds to candidates?

No. IPT-PAC supports friends of physical therapy in Illinois government regardless of party or political philosophy.

Are my contributions to IPT-PAC tax deductible?

Political contributions are not tax deductible for federal income purposes.

Can I designate that my contribution to IPT-PAC be "earmarked" for disbursement to a specific candidate?

No. All contributions are put in one bank account for consideration for disbursement for state candidates based on certain criteria. IPTA members can recommend to IPT-PAC a candidate for which it should support but the IPT-PAC will make all decisions who will receive IPT-PAC contributions.

Will my contribution to IPT-PAC be made public?

All contributors will be recognized at the annual conference. If a member does not want his/her name public IPT-PAC will grant that request.

All cumulative IPT-PAC contributions in excess of \$150 (both cash and in kind donations) are required to be reported to the Illinois State Board of Elections and this information is publicly available.

Can IPT-PAC accept anonymous contributions?

No. Anonymous contributions or contributions made by one person in the name of another person are not allowed. Any anonymous contributions must be forwarded immediately to the State Treasurer.

Does any portion of my IPTA dues go to IPT-PAC contributions to candidates?

No. It is illegal to use association dues for PAC contributions to candidates. All contributions must be separate and voluntary to IPT-PAC.

Is there a minimum contribution level?

All contributions are welcomed and appreciated. The Pt Club level is the lowest level (\$100) to receive a recognition pin, but all contributions are needed with no minimum. All contributors are recognized for participating. Student members have their own Student Club level), to which students can join for \$20.

Contact Information

Colleen Flannery
Executive Director, Illinois Physical Therapy Association
Email: cflannery@ipta.org
Phone: 630.904.0101

Jim C. Milder
Chair, IPT-PAC Board of Trustees
Email:

Phone: (630) 690-1489

Resources

Illinois State Board of Elections - <http://www.elections.state.il.us/>

Board of Trustees and Terms

Name	Date Appointed	Term Expires
Jim C. Milder	1/1/2016	12.31.2023
Joe Hanley	1.1.2017	12.31.2023
Ryan Schallenberg	1.1.2019	12.31.2021
Gail Johnson	1.1.2019	12.31.2021
Peter McMenamin	1.1.2018	12.31.2023