



**MISSOURI ASSOCIATION OF OSTEOPATHIC  
PHYSICIANS & SURGEONS**

# Guidelines and Policies for Elected Affiliate Leaders

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Containing FAQ's and Job Descriptions to Assist Elected Leaders

## **MAOPS Mission**

To preserve and advance the distinct philosophy and practice of osteopathic medicine and to advocate for the profession.

## **MAOPS Vision**

To be the professional organization that osteopathic physicians think of first for expertise, education, and representation.

## **Purpose of this Guide**

District osteopathic associations and other affiliates are the lifeblood of the Missouri Association of Osteopathic Physicians and Surgeons. Thus, our affiliate leaders are instrumental in insuring that the MAOPS mission and vision are achieved through implementation of the strategic plan. In order to better prepare the elected leaders of affiliate organizations, the Board of Trustees has approved these guidelines and policies. Questions regarding duties of elected affiliate officials can be directed to the MAOPS Central Office.

## **Guidelines for Affiliate Osteopathic Association Officials**

### **What is a District Osteopathic Association?**

MAOPS has twelve Affiliate Osteopathic Associations. While each is affiliated with MAOPS, each is individually governed by members of that particular Affiliate. Each affiliate provides members a forum for discussion of local issues and a voice at the state level and on the MAOPS Board of Trustees. MAOPS policy defines the affiliates as:

BOONE COUNTY – Boone

CENTRAL - Audrain, Callaway, Howard, Monroe, Montgomery, Pike, Ralls and Randolph

CENTRAL OZARK - Crawford, Dent, Maries, Phelps and Pulaski

KANSAS CITY REGIONAL - Andrew, Atchison, Buchanan, Caldwell, Clay, Clinton, Daviess, DeKalb, Gentry, Harrison, Holt, Jackson, Nodaway, Ray and Worth

MINERAL AREA - Iron, Jefferson, Madison, Reynolds, St. Francois, Ste. Genevieve and Washington

NORTH CENTRAL - Carroll, Chariton, Grundy, Linn, Livingston, Mercer, Putnam and Sullivan

NORTHEAST - Adair, Clark, Knox, Lewis, Macon, Marion, Schuyler, Scotland and Shelby

OSAGE VALLEY - Camden, Cole, Cooper, Gasconade, Miller, Moniteau, Morgan and Osage

OZARK - Christian, Dallas, Greene, Hickory, Polk, Stone, Taney and Webster

ST. LOUIS - City of St. Louis, Franklin, Lincoln, St. Charles, St. Louis and Warren

SOUTH CENTRAL OZARK - Douglas, Howell, Laclede, Oregon, Ozark, Shannon, Texas and Wright

SOUTHEAST - Bollinger, Butler, Cape Girardeau, Carter, Dunklin, Mississippi, New Madrid, Pemiscot, Perry, Ripley, Scott, Stoddard and Wayne

### **What is an Affiliate Organization?**

MAOPS bylaws allow the formation of other affiliates if certain criteria set forth in policy are met. They can be developed by interested members based on geography, specialty or other special interests, but must have a valid purpose advancing the mission of the organization in order to form. The Board of Trustees has sole discretion in approving new affiliated organizations.

### **Which affiliate officers and leaders need to be elected?**

Affiliates are governed by their own elected officers. While encouraged, officers are not required in order to function as an affiliate. If officers are not elected, the affiliate must designate one

member as the affiliate contact with the Central Office. It is recommended that the following officers be elected:

- District President (2-year term)
- District Vice President (2-year term)
- District Secretary (2-year term)
- District Treasurer (2-year term) (often combined with Secretary)

The President of the affiliate will be the designated contact person for the Central Office. All communication to and from the Central Office needs to go through the affiliate President. If an affiliate does not elect officers, one affiliate member must serve as the contact for the Central Office.

Each affiliate should consider electing officers to administer their affiliate business, serve as leaders in the community; and to facilitate information from MAOPS and initiate their membership's action on crucial issues. Without an affiliate contact, 1) an affiliate will be ineffective, and 2) is unlikely to be approved as an affiliate organization by the Board of Trustees.

It is important for affiliates to elect officers who are willing to serve in a leadership capacity; take action when necessary on issues important to osteopathic physicians, medicine and the community; and who are interested in the profession and the healthcare delivery system.

### **What are the responsibilities of affiliates?**

Strong affiliates are increasingly important. MAOPS frequently requests affiliates, through their official contact, to:

- Assist in membership, advocacy, and public relations efforts.
- Organize members to attend events and serve on MAOPS and state committees
- Assist in disseminating important information quickly to members.

### **What are the general responsibilities of officers and/or official contacts?**

- Promote affiliate and MAOPS events to members and potential members
- Annual membership drive participation
- Coordinate and implement a consistent District meeting schedule
- Attend affiliate meetings
- Proficiently use technology
- Respond in a timely fashion to requests from the Central Office
- Attend training opportunities provided by the Central Office
- Inform members of important affiliate and state association news

### **What are the specific responsibilities of the affiliate officers and/or official contacts?**

The following are suggested responsibilities for affiliate officers.

### ***Affiliate President/Official Contact***

- *Ensure that affiliate membership meets*
- *Serve as liaison with MAOPS staff*
- *Update members with current, relevant information from MAOPS*
- *Prepare meeting agendas*
- *Appoint members to needed positions*
- *Delegate authority to other officers and members*

### ***Vice President***

- *Develop and implement affiliate and MAOPS membership drives*
- *Seek sponsors for affiliate meetings*
- *Serve in President's capacity if President is unable to serve*
- *Perform other duties as delegated by the President*

### ***Secretary***

- *Take accurate meeting minutes and ensure members receive copies in a timely fashion*
- *Provide current membership data to the Central Office*
- *Submit credentials and resolutions in a timely fashion*
- *Serve in President's capacity if President and Vice President are unable to serve*
- *Perform other duties as delegated by the President*

### ***Treasurer***

- *Keep accurate track of financial information*
- *Work with Central Office staff to ensure bills are paid in a timely fashion*
- *Ensure corporation documents are filed with Secretary of State (if needed)*
- *Work with MAOPS staff liaison to ensure affiliate business is in order*
- *Provide financial reports to members and the Central Office*
- *Perform other duties as delegated by the President*

## **MAOPS Affiliate Official Policies**

### **C.1: Policy – Affiliate Organizations**

The MAOPS Bylaws allow the formation of affiliate organizations if they meet the requirements of Board approved policy. An affiliate organization is defined as a group of members who formally develop based on geography, specialty or special interest in order to advance the mission of the organization.

### **Current District Osteopathic Associations**

All MAOPS active districts in existence as of January 1, 2016 are considered affiliate organizations and will remain as such as long as they meet the following criteria:

- 1.) Organize and operate in compliance and within the parameters of MAOPS Articles of Agreement and bylaws, including the mission and vision.

- 2.) Provide the MAOPS Central Office with a single point of contact on an annual basis.
- 3.) Allow MAOPS to collect all membership dues for the district,
- 4.) Allow MAOPS to manage the district funds (bookkeeping), and
- 5.) Reimburse MAOPS for expenses associated with administrative work performed for the district, as directed in current or future policy.

The following are recognized affiliate organizations of the Missouri Association of Osteopathic Physicians and Surgeons. These reflect the established districts of the association and the counties within their borders as of January 1, 2016.

BOONE COUNTY – Boone

CENTRAL - Audrain, Callaway, Howard, Monroe, Montgomery, Pike, Ralls and Randolph

CENTRAL OZARK - Crawford, Dent, Maries, Phelps and Pulaski

KANSAS CITY REGIONAL - Andrew, Atchison, Buchanan, Caldwell, Clay, Clinton, Daviess, DeKalb, Gentry, Harrison, Holt, Jackson, Nodaway, Ray and Worth

MINERAL AREA - Iron, Jefferson, Madison, Reynolds, St. Francois, Ste. Genevieve and Washington

NORTH CENTRAL - Carroll, Chariton, Grundy, Linn, Livingston, Mercer, Putnam and Sullivan

NORTHEAST - Adair, Clark, Knox, Lewis, Macon, Marion, Schuyler, Scotland and Shelby

OSAGE VALLEY - Camden, Cole, Cooper, Gasconade, Miller, Moniteau, Morgan and Osage

OZARK - Christian, Dallas, Greene, Hickory, Polk, Stone, Taney and Webster

ST. LOUIS - City of St. Louis, Franklin, Lincoln, St. Charles, St. Louis and Warren

SOUTH CENTRAL OZARK - Douglas, Howell, Laclede, Oregon, Ozark, Shannon, Texas and Wright

SOUTHEAST - Bollinger, Butler, Cape Girardeau, Carter, Dunklin, Mississippi, New Madrid, Pemiscot, Perry, Ripley, Scott, Stoddard and Wayne

SOUTHWEST - Barry, Barton, Cedar, Dade, Jasper, Lawrence, McDonald and Newton

WEST CENTRAL - Bates, Benton, Cass, Henry, Johnson, Lafayette, Pettis, St. Clair, Saline and Vernon

### **New Affiliate Organizations**

New affiliate organizations (those formed after January 1, 2016) must apply to the MAOPS Board of Trustees for recognition. Application can be made by contacting the Executive Director in writing with the following information:

1. Name of person(s) applying for the affiliate recognition.

2. Proposed name of the affiliate organization.
3. Present a written plan describing the proposed affiliate's purpose for forming, governance structure, and how it will act to advance the mission, vision and strategic plan of MAOPS.
4. Statement that the affiliate will organize and operate in compliance and within the parameters of MAOPS Articles of Agreement and bylaws, including the mission and vision.
5. Membership criteria and dues amount (must charge dues sufficient to cover administrative expense incurred by the Central Office).
6. Names and signatures of at least twenty members of MAOPS that are interested in membership in the affiliate organization.

The proposed affiliate must also agree to:

7. Provide the MAOPS Central Office with a single point of contact on an annual basis.
8. Allow MAOPS to collect all membership dues for the affiliate.
9. Allow MAOPS to manage the affiliate funds (bookkeeping).
10. Reimburse MAOPS for expenses associated with administrative work performed for the affiliate.

Once the above information is received by the Executive Director it will forward to the Board of Trustees for consideration. A 2/3 vote of the Board is necessary for the formation of a new affiliate organization. Requests for additional information may be necessary and are authorized by the Board of Trustees. The Board of Trustees has sole discretion in approving and disapproving application for affiliate organization status.

### **C.2: Deadline for Awards Submission from Affiliates**

In order to ensure timely consideration by the MAOPS Board of Trustees, all affiliate associations and members shall submit nominees for MAOPS awards to the Central Office by December 15 of each year.

### **C.3: Standardization of Elections and Terms for Affiliate Elected Officials**

For the purpose of this policy affiliate "officers" shall be defined as: President, Vice President, Secretary, Treasurer and/or District Contact.

Should an affiliate choose to formally elect officers, in order to insure accurate affiliate credentials, timely communication with affiliates and timely preparation of annual membership meeting materials, MAOPS affiliates shall conduct annual elections for officers and trustees in the fall of each calendar year and submit election results to the MAOPS Central Office by December 15. Officer terms will begin on January 1 and end on December 31. It is recommended that affiliate officer terms be two years in length.

Should an officer vacate a position for any reason, the affiliates shall notify the Central Office and appoint a replacement until the next election or a special election is held.

### **C.4: Affiliate Bookkeeping Protocol**

The procedure for affiliate bookkeeping is as follows:

1. Each affiliate's total assets will be reserved within MAOPS net assets and will be designated as restricted for that district. Instructions must be provided by the affiliate identifying which affiliate members are authorized to approve disbursements.
2. Affiliate dues will be collected through MAOPS as a part of the MAOPS annual membership solicit process. Affiliate dues rates must be defined based on the MAOPS member types only. Each affiliate must provide their dues rates to the Central Office by August 31 of each year.
3. Affiliates can expect a three-week turnaround on disbursement requests.
4. MAOPS will electronically provide a statement of the affiliate's finances quarterly to the affiliate president, treasurer, or district contact.
5. Affiliate assets will be invested according to MAOPS investment strategy. Interest, dividends, capital gains or losses, realized gains or losses and unrealized gains or losses will be allocated once annually to each district accordingly based on their year-end balance (September 30).

Affiliate dues will be collected through MAOPS as a part of the MAOPS annual membership solicit process. ***The Central Office strongly encourages one dues rate.*** Affiliate dues rates must be defined based on the MAOPS member types only. Each affiliate will have to determine what their district rate(s) will be and must notify the Central Office of the dues rate by August 31 of each year.

- As an example, MAOPS has the following member types (partial listing): Post-graduate, first year, second year, third year, full, part-time and retired members. If a district wants more than one rate, the rates must be applied based on the MAOPS member type and the MAOPS definition of member type. If, for example, the Southwest district has two rates – one for practicing physicians and one for retired physicians – only retired members per the MAOPS database in the Southwest district will be charged the Southwest district's retired rate.
6. Disbursements needed by the affiliate must be requested via email, fax or US mail of the Central Office a minimum of three weeks before the disbursement is due. MAOPS processes disbursements every Wednesday (except during MOAC or MSACOF's WSS). Requests received by end of day Tuesday will be processed. The disbursements request form (see attached) must be completed and the appropriate signature(s) (as previously defined by the affiliate) must be included.
  7. Members of the affiliate needing reimbursement for an expense of the affiliate he or she paid personally, must complete the disbursements request form, obtain the required signatures and send to the Central Office via email, fax or US mail. Reimbursements will be made weekly in accordance with MAOPS disbursements process as previously defined.
  8. Quarterly, MAOPS will provide a reconciliation of each affiliate's accounts to the affiliate's President electronically. A listing of the paid affiliate members will be included with the reconciliation.

*This policy is also found as E.14*

### **C.5: Guidelines and Policies for Affiliate Elected Leaders**

The manual “Guidelines and Policies for Affiliate Elected Leaders” will be reviewed and updated at least every three years by MAOPS staff. Major changes and all policy additions and/or deletions must be approved by the MAOPS Board of Trustees.

The manual will be made available to all MAOPS members. All affiliate elected officials will receive a copy of the manual annually after affiliate credentials are received by the Central Office.

Affiliate officials may be asked to complete a written attestation that they have received and reviewed the manual and understand the expectations of an affiliate elected official.