



INTERNATIONAL
ORTHOPTIC
ASSOCIATION

IOA Handbook[®]

DISCLAIMER

This document is to be used as a guide to the functions of the International Orthoptic Association. Anything contained in the Handbook does not, nor is meant to, replace any of the legal documents which regulate the objectives, powers and proceedings of the Association.

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1. Introduction

- A.** This Handbook has been compiled and published by the Council of Management of the International Orthoptic Association with the object of describing, in simple language, the operations of the Association, its Council and Committees, the duties of the President, the Executive Officers of the Council and the Office Bearers of the Committees of the Association, and any other information that the Council from time to time deem to be necessary or helpful.
- B.** For further information, refer to the legal documents which regulate the objectives, powers and proceedings of the Association.
- C.** These documents include the following:
- 1) The Companies Act of the United Kingdom 1948 and all subsequent Companies Acts of the United Kingdom, normally referred to as the Constitution
 - 2) Memorandum of Association which defines the objectives and powers of the Association
 - 3) Articles of Association which provide a code for efficient operation of the Association. In minutes of Association's meetings
 - 4) Regulations adopted by the Association
 - 5) Resolutions passed by the Association
 - 6) Standing Orders
 - 7) Requirements of the Charities Commission of the United Kingdom
- D.** For ease of reference, the source authority contained in the above documents is quoted in brackets in this Handbook in the following manner:
- Sec = Section of the Companies Act
M = Paragraph of the Memorandum
A = Paragraph of the Articles
Min (GM) = Minutes of the General Meeting of the Association
Min (C) = Minutes of a Council Meeting of the Association
Terms of Reference = Terms of Reference decided upon by the Council
(usually an appendix to the minutes)



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OFFICIAL ASSOCIATION INFORMATION

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2. Contact Information

- A.** The name of the Association is the International Orthoptic Association.
Registered address:
RPG Crouch Chapman LLP
62 Wilson Street
London EC2A 2BU
United Kingdom
Homepage: <http://www.internationalorthoptics.org>
- B.** Name and address of President:
Karen McMain
6428 Norwood Street
Halifax, Nova Scotia B3H 2L3
Canada
- C.** Name and address of Secretary:
Katherine J Fray
12611 Westglen Drive
Little Rock, AR 72211
USA
- D.** Name and address of Treasurer:
Jane Tapley
93 The Avenue
Mortimer
RG7 3RB
United Kingdom
- E.** Name and address of Accountant:
Nick Heath
RPG Crouch Chapman LLP
62 Wilson Street
London EC2A 2BU
United Kingdom
- F.** Name and address of Bank:
Lloyds TSB Bank plc
Hampstead Branch
40 Rosslyn Hill
London NW 3 INL
United Kingdom
- G.** The Solicitor shall be selected by the current officers of the IOA and approved by the Council of Management.

Name and Address of the current Solicitor:

Hempsons Solicitors
Hempsons House
40 Villiers Street
London WC2 N6NJ
United Kingdom

3. Registered Office

- A.** English law requires that a company such as the IOA, which is registered in the United Kingdom, has a registered office in the United Kingdom. The address of the office must be registered with the Registrar of Companies.
- B.** The legal requirement governing a registered office is for it to hold a register which contains:
 - 1) names and addresses of members of the Association
 - 2) names and addresses of the members of Council
 - 3) name and address of the Secretary
- C.** The address of the registered office of the Association:
RPG Crouch Chapman LLP
62 Wilson Street
London EC2A 2BU
United Kingdom
- D.** Internet address:
<http://www.internationalorthoaptics.org>

4. IOA Charitable Status

In 1970, the Association was granted charitable status by the Charity Commission of the United Kingdom and was thus exempted from the payment of most United Kingdom taxes.

5. Legal Entity

The Association was incorporated as a company limited by guarantee on April 16th, 1974 according to English Law under the Companies Act 1948 to 1967 of the United Kingdom. Incorporation confers many desirable advantages upon the Association including the right to own property, to act as a legal entity for the purpose of enforcing and defending its rights and assets and defining and regulating the conduct of its affairs. In other words, the Association has, under English law, the same rights and liabilities as any other registered company.

6. Official language of the Association

- A.** After a great deal of thought and taking into consideration that English was the language spoken by the majority of members and that the constitution was set up under English Law, it was agreed that English should be the official language of the Association. [Min (AGM) 1971; 5D(ii)]
- B.** However, the needs of non-English speaking members of the Association should be considered at all times. Accordingly, the following language procedures shall be followed:
 - 1) English shall be used at all Council meetings and in official communication with National Associations
 - 2) English shall be used at the AGM of the Association. In countries where English is not the official national language, attempts shall be made to have proceedings of the AGM simultaneously translated into the official language of the host country
 - 3) The Council of the Association shall decide prior to the forthcoming Congress, in what language(s) the papers presented at the Congress are to be published in the Transactions

7. Accounts and Audits

- A.** Proper books of account shall be kept by Council with respect to:
 - 1) all sums of money received and expended by the Association with proper details
 - 2) all sales and purchases of goods
 - 3) assets and liabilities of the Association [A50]
- B.** The books of account shall give a true and fair view of the state of affairs of the Association and explain its transactions.
- C.** The books of account shall be kept at the registered office of the Association or elsewhere subject to the Act, determined by the Association. [A51]
- D.** The books of account shall always be open for inspection by members of the Council. [A52]
- E.** The Council shall from time to time determine whether and to what extent, at what times and places, and under what conditions and regulations the accounts of the Association shall be open for inspection by members of the Association who are not members of the Council. [A52]

- F.** No member who is not a Council member shall have any right of inspection other than as covered by law or authorised by the Council or the Association in a General Meeting. [A52]
- G.** At each AGM the Council shall present to the Association:
 - 1) a proper income and expenditure account
 - 2) a proper balance sheet
 - 3) proper reports of Council and the Auditors
- H.** Copies of the accounts, balance sheet and reports prepared to comply with statutory requirements shall be sent to all persons entitled to receive notice of general meetings not less than twenty-one (21) clear days prior to the AGM.
- I.** Audit
 - 1) Once in every year the accounts of the Association shall be examined and the correctness of the income and expenditure account and balance sheet ascertained by one or more properly qualified auditor or auditors.
 - 2) The auditor's report shall be open for inspection and be read before the meetings as required by the Act. [A52]
 - 3) Auditors shall be appointed and their duties regulated in accordance with the Act. [A53]

8. The Seal of the Association

- A.** In ancient times important legal documents were executed by individuals by affixing in wax an imprint of their seal. Subsequently the need for the affixing of a seal was dispensed with and a signature was considered a sufficient execution of document. Execution by a company or similar organisation of legal documents has always been performed by the affixing of the organisation's Common Seal by officers of the organisation having the custody of such seal. The proper affixing of the Common Seal is evidenced by the signatures of two (2) members of the Council and the Secretary. [A35]
- B.** The Seal of the Association shall not be affixed to any document except by the authority of a resolution and in the presence of at least two (2) members of the Council and the Secretary who shall sign every document to which the Seal has been affixed in their presence. [A35]
- C.** In favour of any purchase or person bona fide dealing with the Association such signatures shall be conclusive evidence of the fact that the Seal has been properly affixed. [A35]

- D.** The Seal is held for safe custody with the Secretary.

9. Dissolution of the Association

- A.** Upon dissolution of the Association after all debts and liabilities have been paid, any surplus property shall not be paid to or distributed among the members of the Association, but shall be given or transferred to some other charitable institution or institutions which have objectives similar to those of the Association, and which shall prohibit the distribution of its or their income and property among its or their members as is imposed on the Association. [M4, A57]

- B.** The institution or institutions mentioned in paragraph 9A shall be determined by the members of the Association at, or before, the time of dissolution and so far as effect cannot be given to this provision, then to some charitable object. [M7, A57]



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ABOUT THE IOA

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10. Historical Background

- A.** The British Orthoptic Society initiated and organised the first International Orthoptic Congress in London on July 3rd, 1967. At the conclusion of the Congress, the BOS proposed the formation of the International Orthoptic Association.
- B.** The Interim Committee consisted of representatives from Australia, Brazil, Canada, France, Holland, Switzerland and the United Kingdom which formulated the Constitution.
- C.** In 1970, the Association was granted charitable status by the Charity Commission of the United Kingdom.
- D.** The Association was incorporated as a company limited by guarantee on April 16th, 1974 according to English Law under the Companies Act 1948 to 1967 of the United Kingdom.
- E.** When the Association became incorporated in 1974 the member countries of the Association were: Australia, Brazil, Canada, France, Holland, Italy, Switzerland, the United Kingdom, USA, and West Germany. Since this date the National Associations of the following countries have become members of the Association:
 - 1) South Africa: 1977 (Full Member); changed to Associate Member in 2009.
 - 2) Austria: 1978 (Full Member)
 - 3) Sweden: 1980 (Full Member); replaced by the Scandinavian Association in 1983 (Full Member) which includes Denmark, Norway and Sweden.
 - 4) Japan: 1980 (Full Member)
 - 5) Belgium: 1989 (Full Member)
 - 6) Portugal: 1994 (Full Member)
 - 7) Italy: 1996 (withdrew from Full Membership to become an Associate Member); regained Full Membership status in 2000.
 - 8) Brazil: 2001 (withdrew its membership); re-joined as an Associate member in 2008.
 - 9) Asia Pacific: 2005 (Associate Member)
 - 10) India: 2006 (Full Member); changed to Associate Member in 2015
 - 11) Czech Republic: 2007 (Associate Member)
 - 12) Hong Kong: 2010 (Associate Member)
 - 13) New Zealand: 2012 (Associate Member)
 - 14) Pakistan: 2013 (Associate Member)

15) Israel: 2015 (Associate Member)

- F.** International law as it stood in 1988 made no provision for the registration of an organisation such as the Association. As the resolution to incorporate was sponsored originally by the British delegates, it was unanimously decided to seek incorporation in the United Kingdom rather than any other country.

11. IOA Vision Statement [COM approved, September 2013]

The IOA envisions itself as the global advocate for orthoptic learning, research and professional excellence.

12. IOA Mission Statement [COM approved, September 2013]

The International Orthoptic Association serves its members by:

- developing the capacities of orthoptic professionals
- providing standards of excellence in specialized eye care
- setting standards for clinical practice and education based on research

with the aim of promoting continued quality improvement for the benefit of their patients.

13. IOA Fundamental Beliefs [COM approved, September 2013]

- A.** The Association's most important assets are its members.
- B.** IOA success is dependent upon respect and trust within a strong, unified Council of Management working with IOA Member Associations and individual members.
- C.** The IOA is communicative and transparent.
- D.** The IOA is accountable.
- E.** The IOA acts ethically, fairly and with integrity.

14. Objectives of the Association

- A.** To promote the science of orthoptics, the publication of related scientific material and the treatment of disorders of the binocular system for the generation of knowledge of the science of orthoptics.

- B.** To provide information and assistance to national authorities and individuals in order to initiate and develop the practice of the science of orthoptics throughout the world.
- C.** To promote high standards of training and practice in orthoptics.
- D.** To organize international congresses for orthoptists and others concerned with the practice of orthoptics and for the generation of knowledge of the science of orthoptics. [M3 iv]
- E.** The IOA adopted the following **aims**:
 - 1) To provide a service to patients by encouraging a high standard of practice in orthoptics.
 - 2) To encourage high standards in the training of orthoptists.
 - 3) To foster the science of orthoptics.
 - 4) To encourage and maintain an internationally acceptable terminology.
 - 5) To provide information and assistance to national organisations as well as to individuals so that orthoptic services may be initiated and developed throughout the world.
 - 6) To organise at regular intervals International Orthoptic Congresses [Min (GM) 1968; pages 2–3]

15. What Makes the IOA Unique? [COM approved, September 2013]

The Association's uniqueness is based upon its:

- A.** Superior knowledge and understanding of the orthoptic profession in most cultures of the world
- B.** Established international structure and network
- C.** Membership strength



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OPERATIONS

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16. Definitions and Abbreviations

For the purpose of this Handbook, the following words and abbreviations are defined:

Word	Meaning
The Acts	The Companies Act 1948 of the United Kingdom, and subsequent Companies Acts
AGM	Annual General Meeting
Articles	Articles of Association of the IOA. These articles govern the conduct of members themselves, e.g. proceedings at meetings
Association	The International Orthoptic Association (IOA)
CM	Council Meeting
COC	Congress Organising Committee
COM	Council of Management
Congress	International Orthoptic Congress
Council	The Council of Management of the IOA (COM)
CSPC	Congress Scientific Programme Committee
EGM	Extraordinary General Meeting
Ex-officio	Position on a committee given automatically to a person because he holds an office in the Organisation. For example: The President of the IOA by virtue of being President of the IOA is a member of all IOA Committees. The ex-officio member shall be counted in the usual way for quorum purposes.
ICO	International Council of Ophthalmology
IOA	International Orthoptic Association
IOC	International Orthoptic Congress
IPOSC	International Pediatric Ophthalmology and Strabismus Council
ISA	International Strabismological Association

IVSS	International Vision Screening Survey
Memorandum	Memorandum of Association of the IOA. The Memorandum governs external relationships of that Association, e.g. ownership of property.
Motion	A proposed resolution before it has been adopted (i.e. passed or carried) by the meeting.
National Association	A National Orthoptic Association recognised by the Council, representative of the profession in that Country.
Ophthalmologist	Registered medical practitioner specialising in the field of ophthalmology.
Orthoptists	Those who have a certificate of qualification in orthoptics issued by a medical examining body and/or by an educational institution recognised and acknowledged by the government of the country or political subdivision thereof in which the individual practices, which entitles them to practise orthoptics in that country and to diagnose and treat sensory and motor disorders of the ocular system.
OWWS	Orthoptic Worldwide Survey
PCO	Professional Congress Organiser
PCo's	Program Coordinators
Regulation	A rule passed by the Council
Resolution	A formal determination passed by the Council
Seal	The impression of dye stamp which represents the «signature» of the Association
SMR	Social Media Reporter
Special Resolution	Resolution passed by the members of the Association at a general meeting convened in accordance with the length of notice and the required majority of votes prescribed by the Act.
WSPOS	World Society of Pediatric Ophthalmology and Strabismus

Year Period of time between the end of one Council of Management meeting and the end of the Council meeting in the following year. This is not necessarily one calendar year.

To avoid any suggestion of discrimination, words importing the masculine gender shall include the feminine and single number shall include plural number.

Please see Section 32 for the names and abbreviations of the National Association for all current IOA member countries.

17. Structure of the Association

- A.** The control of the Association is vested in its members. This control is exercised by resolution at General Meetings of the Association. All members are eligible to attend and vote at any General Meeting except ophthalmologists and affiliates.
- B.** General meetings of the Association are either:
 - 1) Annual General Meetings
 - or
 - 2) Extraordinary General Meetings.
- C.** Between General Meetings, the business of the Association shall be managed by the Council.
- D.** The IOA uses a program management structure. [COM approved, June 2013]
 - 1) There are five (5) program areas which work together to meet the aims and objectives for the organisation.
 - 2) The work is carried out by Program Coordinators (PCo's), project team leaders and project team members. The PCo's oversee ongoing functions and time-limited project teams which are guided by specific costed project plans. (see Sections 28-30)
 - 2) Program meetings are held annually in conjunction with the IOA Council of Management to plan and develop program projects.
 - 3) Program area project-specific work is carried out during the year.
- E.** Program Areas
 - The five IOA program areas are: (see Section 27)
 - 1) Operations Management
 - 2) Promotion and Development

- 3) International Cooperation
- 4) Education and Research
- 5) Standards and Quality

18. General Meetings of the Association

General Meetings of the Association are either Annual General Meetings or Extraordinary General Meetings. [A9]

A. Annual General Meetings (AGM)

- 1) The first AGM of the Association was held in Amsterdam, May 10th 1971.
- 2) The AGM shall be held in each calendar year at such time and place as the Council shall determine.
- 3) It is the policy of the Council to hold the AGM in a different venue each year. Before determining the venue the Council shall consider applications by National Associations to act as host for the forthcoming AGM.

B. Extraordinary General Meetings

- 1) All General Meetings other than AGM's shall be extraordinary meetings.
- 2) The Council may convene an Extraordinary General Meeting whenever it thinks fit. An Extraordinary General Meeting shall be convened by the Council upon a demand by members of the Association as provided in the Act. If the Council fails to convene such an Extraordinary General Meeting, the meeting may be convened by the members who demanded the meeting. [A7]

C. Attendance at meetings

- 1) Full members
- 2) Individual members
- 3) Associate members except ophthalmologists

D. Quorum

No business shall be transacted at any General Meeting of the Association unless a quorum is present. A quorum shall be ten (10) members personally present. [A11] If a quorum is not present within half an hour after the appointed time for the holding of the meeting, and if the meeting was convened by the members, the meeting shall be dissolved. In any other case the meeting shall stand adjourned until further notice. If at the adjourned meeting a quorum is not present

within half an hour after the appointed time for the holding of the meeting, the members present shall be a quorum. [A12]

E. Notice of Meeting

- 1) A notice convening an AGM shall state that the meeting is an AGM.
- 2) Notice of a Meeting shall specify the place, date and hour of meeting and in the case of special business, the general nature of that business shall be stated. [A8]
- 3) In the case of the AGM and any meeting convened to pass a special resolution, at least thirty (30) days' notice in writing shall be given. Care should be taken in the calculation of the 30 day period to comply with the Act, particularly in the case of notice served by post. [A8]
- 4) Notice of any General Meeting shall be given to such persons including the auditors who under the Articles and the Act are entitled to receive notice of such a meeting. [A8]
- 5) A General Meeting other than an AGM may be convened by all those members who have the right to attend and vote after such period of notice as they think fit. [A8]
- 6) A resolution or proceeding at any meeting shall not be invalidated by reason of the accidental omission to give notice or the non-receipt of such notice by any person entitled to receive a notice. [A9]

F. Service of Notice of Meeting

- 1) A notice may be served by the Association upon any member either:
 - a. Personally
 - b. by sending it through the post by prepaid letter to such a member at his registered address as appearing in the register of members [A54]
 - c. by any other acceptable electronic communication
- 2) Any notice served shall be deemed to have been served within thirty (30) days following the day on which the letter containing the notice was sent. If the member is a resident outside Europe, the prepaid letter should be sent by airmail post.

G. Proceedings at General Meetings

- 1) All business at an Extraordinary General Meeting shall be that business for which the meeting was called.
- 2) At an AGM all business other than the consideration of the following shall be deemed special business:
 - a. Income & Expenditure Account and Balance Sheet
 - b. Reports of the Council (the President's report) and auditors

- c. Election of members of the Council in place of those ceasing to serve or retiring
 - d. Appointment of and the fixing of the remuneration of the Auditors
- 3) The Council may determine that any matter which may be voted on as special business at any Annual Meeting may be voted on by postal vote or any other acceptable electronic form.
 - 4) The President of the Association shall preside as President at every General Meeting. If there is no such President or if at any meeting the President is not present within fifteen (15) minutes after the time appointed or shall be unwilling to preside, the members present shall choose a member of the Council to preside. If no Council members are present or if all the Council members present decline to take the chair, the members shall choose some member of the Association who is present to preside. [A13]
 - 5) The President may with the consent of any meeting at which a quorum is present, adjourn the meeting from time to time and from place to place. However, no business shall be transacted at any adjourned meeting other than business which might have been transacted at the meeting at which the adjournment took place. [A14]
 - 6) When a meeting is adjourned for thirty (30) days or more, notice of the adjourned meeting shall be given in the same manner as the original meeting. If the adjournment is for less than thirty (30) days, members shall not be entitled to any notice of adjournment or of the business to be transacted at an adjourned meeting. [A14]

H. Poll

- 1) There are two (2) well known methods of voting:
 - a. by a show of hands
 - b. by a poll
- 2) A poll is defined as a list or register of persons present at a meeting who may vote. In companies it is usual that every member present in person at the meeting has one (1) vote on a show of hands, and on a poll one (1) vote for each share held (i.e. if one person has fifty (50) shares he is entitled to fifty (50) votes). A proxy shall not be counted on a show of hands. As the Association is a company limited by guarantee, no shares are issued to members and, therefore, each member present at the meeting has only one (1) vote whether on a show of hands or on a poll. Proxy votes may only be counted on a poll.
- 3) On a poll the President may require the casting of votes to be in writing, but this is not essential. The President may adjourn the

meeting for the purpose of the conduct of the poll and the counting of votes. A poll may be demanded by the President or by at least three (3) members present in person or by proxy. It may also be demanded by a member or members who are present in person or by proxy and who represent one tenth (1/10) of the total voting rights of all members who have the right to vote at the meeting. [A15]

- 4) The demand for a poll may be withdrawn. [A15]
- 5) No poll shall be demanded on the election of a President of a meeting or on any question of adjournment. [A17]
- 6) If a poll is demanded, it shall be taken at such time and place and in such manner as the President of the meeting shall direct and the result of the poll shall be deemed to be the resolution of the meeting at which the poll was demanded. [A16]

I. Votes of members

- 1) Each member shall have one (1) vote as presently constituted. [A20]
- 2) No member other than a registered member who has fully paid all dues shall be entitled to vote on any question either personally or by proxy or as a proxy for another member. [A21]
- 3) Votes shall be given by a show of hands unless a poll has been demanded.
- 4) A proxy may be appointed by a member. The appointment of a proxy shall be in writing. The proxy need not be a member of the Association. A proxy shall have no vote when the vote is taken by a show of hands, but the proxy's vote will be counted on a poll. The Document of appointment of the proxy shall be in the form set out in Article 26, or as close to it as possible. [A26] (Appendix E)
- 5) The Document appointing the proxy shall remain valid for twelve (12) months. [A24]
- 6) A document of appointment is revoked by the death, insanity or revocation of the member giving the proxy. However, a vote by a proxy shall be valid unless written notice of such death, insanity or revocation is received by the Association prior to the meeting at which the proxy voted. [A25]
- 7) Unless a poll has been demanded, a declaration by the President that a resolution has been: carried, carried unanimously, carried by a particular majority, lost or not carried by a particular majority and an entry to that effect in the minute book of the Association shall be conclusive evidence of the fact.
- 8) In case of equality of votes whether on a show of hands or on a poll, the President shall be entitled to a second or casting vote.

- 9) The demand for a poll shall not prevent the continuance of a meeting for the transaction of any business other than the question on which a poll has been demanded.

19. Council of Management

- A.** The Council shall consist of an independent President and one Council member from each member country where there is an accepted National Orthoptic Association. [A27]
- B.** Membership of the Council is limited to orthoptists who are members of the Association. [A27]
- C.** Council members shall be elected by their National Orthoptic Association in any manner determined by that Association. The name of the representative shall be notified in writing to the Association by the President of the National Association. In the event of a representative of a National Association being appointed President, that National Association shall nominate another representative. [A27]
- D.** Any country where there is a National Association may apply for representation (seat) on the Council. Application shall be made in writing to the Secretary and shall be accompanied by a completed questionnaire. [Min (C) 1970; 10c]
- E.** If the Council recognises a National Association between Congresses the nominee of that Association may take his place as soon as notification of his appointment has been made.
- F.** The Council has the power to appoint any member of the Association as a member of the Council either to fill a casual vacancy or as an additional Council member.
- G.** A Council member shall normally hold office from the end of one Congress until the end of the next Congress unless the National Association nominating the Council member decides to replace its representative which it may do at any time. [A28 (b); Min (C) 1975; 4b] Such replacement requires written notice to the Secretary. [A28 (b)] However, the Council has agreed that changes in representation on the Council should be kept to a minimum at times when a change in President is envisaged. [Min (C) 1976; 5(i)]
- H.** A Council member may be disqualified and cease to serve on the Council if:
 - 1) the Member is declared bankrupt or his affairs are controlled under bankruptcy legislation [A36]
 - 2) the Member becomes of unsound mind [A36]

- 3) the Member resigns [A36]
- 4) the Member ceases to be a member of the Association [A36]
- 5) an order of disqualification has been made against the Member for conviction of a criminal offence or in respect of an offence under the Companies Act [Sec. 188]
- 6) the Member is removed from office by a resolution of the Association [Sec. 184]
- 7) the Member ceases to be a member by virtue of Sec. 185 which states that:
 - a. no person shall be appointed if at the time of appointment he has attained the age of seventy (70) years
 - b. a member shall vacate his office on the Council at the conclusion of the Annual General Meeting after his seventieth (70th) birthday
 - c. the above conditions may be overruled by a resolution of the Association at a General Meeting [Sec. 185]

20. Powers of the Council of Management

- A.** The business of the Association shall be managed by the Council of Management which may:
 - 1) pay all expenses
 - 2) exercise all powers of the Association unless prevented by Company Law or the Memorandum and Articles or by any regulation resolved by a General Meeting [A31]
- B.** Any proposal that will affect the National Associations (financial or otherwise) must be listed as an agenda item. [Min (C) 1990; 6.1.1]
- C.** Any vacancy on the Council shall not prevent the Council from continuing to do business. However, if the number of members is at any time reduced to less than the minimum number nine (9) members, the Council may only act to fill the vacancy in the Council or to call a General Meeting, or to admit new members of the Association, but for no other purpose. [A32]

21. Meetings of the Council of Management

- A.** Guidelines for Council Meeting Locations and Venues [Min (C) 2014; 17B]
 - 1) The IOA President will make every effort to provide a list of annual COM meeting locations and dates to the IOA Council of Management 4 years in advance. This should enable COM members and their national

associations to plan fiscally and schedule appropriately to ensure their attendance and participation at COM meetings.

- 2) The IOA will attempt to rotate COM meeting locations around IOA members association continents (Europe, Asia-Pacific, North America and South America) while recognizing that it may not be possible to hold a COM meeting in each continent during a 4 year period. Preference will be given to holding COM meetings in full member association countries, but does not preclude visits to associate member countries.
- 3) An effort will be made to allow associate members to participate in any portion or the entire COM meeting via conference call, video conference or Skype where time zones permit participation and access to technology permit participation. Additional cost for technology for associate member participation will be borne by the associate member country.
- 4) Every two years the COM meeting will be held in conjunction with either the IOA Congress or ISA congress.
- 5) The annual COM meeting will ideally be held in a city that is accessible by international flights or easy travel via public transport to the meeting city from international airports in neighbouring cities.
- 6) Every effort will be made to ensure the IOA AGM is held in conjunction with the annual COM meeting. Additionally, attempts will be made to coordinate the annual COM meeting and IOA AGM with the annual national meeting of the member country.
- 7) Every effort will be made to ensure an IOA symposium is held in conjunction with any IOA AGM.
- 8) Every effort will be made to provide COM members with the option to book their accommodation in a hotel where a COM member rate has been negotiated.
- 9) The COM meeting room will ideally will have access to WiFi; have access to a data projector so PowerPoint presentations can be given; have a flip chart, white board, blackboard or smart board; allow for seating in the round or U; and can have breaks and lunch can be provided in the meeting room or have a room close by where catering can be provided. Ability for COM members to charge their tablets or computers would be considered an asset as are room microphones and access to a conference phone.
- 10) The Chair of the National Association in the country where the annual COM meeting will take place in will be invited to the COM meeting as an observer.

B. President

- 1) The President shall be elected in the manner set out in Section 23 of this Handbook.
- 2) The President shall hold office from the end of one International Congress to the end of the next International Congress. [A42]
- 3) In case of an equality of votes the President shall have a second or casting vote.
- 4) If at any meeting the President is not present within fifteen (15) minutes of the time appointed for holding the meeting or is unwilling to preside, or in the event of the illness of the President, the Deputy President will preside. The Deputy President will be elected from among Council members (see section 25B). In the event of the Deputy President not being present, a replacement from within the Council will be elected to preside. [A43]

C. Proceedings at Council Meetings

- 1) The Council may meet together for the dispatch of business, adjourn and otherwise regulate their meetings as they think fit. [A37]
- 2) In matters requiring decisions of the Council of Management of the IOA, a formal proposal is made and seconded prior to discussion. The decision of the Council be then duly recorded and accepted as policy. [Min. Nürnberg, May 1986]

D. Voting

- 1) Questions arising at any meeting shall be decided by a majority of votes. [A37]
- 2) Council members may vote by proxy at Council meetings. The proxy must be a member of the Association but need not be a member of the Council.
- 3) The Council may conduct meetings by means of postal votes or any other acceptable electronic form but no decision may be reached except when:
 - a. there is a positive vote of three (3) members if the Council membership does not exceed twelve (12)
 - b. there is a positive vote of five (5) members if the Council membership exceeds twelve (12) [A39]
- 4) In the case of an equality of votes the President shall have a second or casting vote. [A37]

E. Quorum

- 1) We define a quorum to be two-thirds (2/3) of the full member countries. [Min (C) 2014; 19C]
- 2) A quorum must be present before any Association business can be transacted (such as stating a new motion or conducting a vote) at a council meeting. It is the chair's duty to determine, although he/she need not announce, that a quorum is present.
 - a. When the chair has called a meeting to order after finding a quorum is present, the continued presence of a quorum is presumed unless it is noticed that a quorum is no longer present. The chair has the duty to declare the absence of a quorum.
 - b. In the absence of a quorum, the only actions that can legally be conducted are to:
 1. Fix the time in which to adjourn
 2. Recess
 3. Take measures to obtain a quorum (i.e., contacting members during a recess and asking them to attend)
 - c. In the absence of a quorum, any other business transacted is null and void so the chair should wait until there is a quorum present. If there appears to be no prospect that a quorum will assemble, the chair can call for an adjournment.
- 3) A member of the Council may, and on request of a member of the Council, the Secretary shall at any time summon a meeting of Council by notice served upon all of the Council members. [A40]

F. Observers

- 1) The Council may invite one member of the Association from any country in which there is no National Orthoptic Association recognised by the Council as representative of the profession in that country to attend meetings of the Council as an observer. [A5 (9e)]
- 2) An observer shall have no rights to vote. [A5 (9e)]

G. Appointment of Committees

- 1) The Council may delegate any of its powers to Committees or to such member or members of the Association as it thinks fit. [A46]
- 2) Any Committee so formed to carry out these delegated powers shall conform to any regulations imposed upon it by Council. [A46]
- 3) The meetings and proceedings of any Committee shall be governed by the provisions of the Constitution for regulating meetings and proceedings of Council so far as applicable and so far as the same shall not be superseded by any regulations made by Council. [A46]

H. Validity of Acts of Council Committees

Any acts undertaken in good faith by any meeting of the Council, any Committee of the Council, or by any member of the Council, shall be valid even if it is afterwards discovered that there was some irregularity in the appointment or continuance in office of any such member of Council, or committee of Council, or that any such person was disqualified. [A47]

I. Minutes

- 1) Proper minutes shall be made of the proceedings of all meetings of the Associations and of the Council and Committees/Networks of the Council, and all business transacted at such meetings.
- 2) The minutes of any meeting if signed by the President of the meeting or by the President of the next meeting, shall be sufficient evidence without any further proof of the facts stated in the minutes. [A48]

22. Subscriptions and Levies

A. Subscriptions

- 1) All members of the Association shall pay an annual subscription to be fixed from time to time by the Council. [A6 (a)]
- 2) The National Associations (Full Members of the IOA) shall pay an annual per capita subscription for their Full Members.
- 3) Subscriptions are due for payment not later than 31st January in each year. [Min. (C) 2007; 5.3.4d]
- 4) In 1985 it was agreed that subscriptions be increased using the following principles:
 - a. that a small annual increase of subscription is preferable to an occasional large increase
 - b. that an annual increase be based on the English rate of inflation, but that this should not exceed 10%
- 5) In 2001 it was decided to limit the fee for large organisations with an upper limit of 1500 as the maximum number of per capita subscription to be paid. These are to be full fee paying members rather than any other category. This decision is subject to review as necessary.

B. Levies

Each National Association which exercises its rights to nominate a member of the Council shall pay to the IOA an annual levy.

- 1) The levy may be varied by the Council from time to time.

- 2) Council members may not sit or participate in deliberations of Council until the levy payable by their National Association has been received by the Association. [A6 (d)]
- 3) The amount of the seat levy shall be based on a scale related to the number of practising members in their particular association.
- 4) The scale is graduated in the following manner [Min. (C) 2011; 5.3.4A]

<u>Number of practising members</u>	<u>Levy</u>
up to 50	£20
51 to 100	£25
101 to 200	£30
201 to 300	£35
301 to 400	£40
401 to 500	£45
501 to 600	£55
601 to 700	£65
701 to 800	£85
801 to 900	£95
over 900	£110

C. Financial Year

The financial year shall commence on 6th April in each year and terminate on 5th April in the following year. [Min (C) 1974; 9f (iii))Accounts and Audit]



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COUNCIL MEMBERS

(Sections 23-25)

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23. President of the Association and of the Council of Management

- A.** The President of the IOA is also President of the Council of Management.
- B.** The President shall be a member of the Association, but not necessarily a member of a National Association.
- C.** During the term as President of the IOA, the President shall not simultaneously be President or Chairman of a National Organisation.
- D.** The President shall hold office from the end of one International Congress to the end of the next International Congress. [A42]
- E.** The President is eligible to serve no more than two (2) consecutive terms of office. [Min (C) 1991; 4.5.5]
- F. Election procedure**
 - 1) The election procedure and announcement of the result should be made in time to allow the President-elect to make arrangements to attend the Council of Management meeting and the Annual General Meeting (if held at the same venue) one (1) year prior to the Congress. The election shall take place in the twelve (12) months prior to these meetings.
 - 2) The President shall be elected at least one (1) year prior to taking office and shall serve as President-elect during that year.
 - 3) Nominations for the office of President, accompanied by relevant curriculum vitae and a letter of intent from the nominee outlining their visions for the future of the IOA shall be submitted to the Secretary. Nominations accompanied by the written acceptance of the nominee shall be accepted from a National Association with representation on the Council. Any member of the Association is eligible for nomination by a National Association. [A41 (a)]
 - 4) During the twelve (12) months before the Annual General Meeting at which the announcement of the appointment of the President is made, the existing Council shall vote on the nominations. [A41 (b)] The election of the President shall be conducted by secret ballot in a form to be decided by the Council. A committee of scrutinizers agreed upon by the Council shall be convened to conduct the ballot. The nominee who has received the most votes shall be declared elected. If only one candidate is nominated they shall be considered elected and a ballot is not necessary. Following the election, the current President shall communicate the vote results with the name of the new President-elect.

- 5) The announcement of the appointment is to be made during the Annual General Meeting in the year prior to the congress. [Min (C) 1991; 4.5.5.1]
- 6) The purpose of the President-elect is to enable a smooth transition from one President to the next.
- 7) The current President shall keep the President-elect informed of all IOA activity during the year preceding the President-elect becoming President.
- 8) The President elect should attend the IOA Council meeting one (1) year prior to the Congress.
- 9) Economy travel expenses should be paid by the IOA, if the President elect is not already a Council member. [Minutes South Africa, May 1993]

G. The Deputy President

- 1) In the event of the President being:
 - a. unable to continue his/her duties for a specific period of time
or
 - b. unable to continue his/her duties on a permanent basis
 the person so elected as Deputy President from within the Council of Management will immediately assume the role of President for such time as is necessary.
- 2) In the case of (b), Presidential election procedure as set out in the Handbook will be implemented as soon as possible.
- 3) The Deputy President will NOT automatically become the next President of the Association.

4) Election Procedure

The Deputy President will be elected by secret ballot from within the Council of Management.

- a. Council members wishing to stand for election should make this fact known to the President and Secretary at the appropriate time prior to the meeting at which election is to take place (together with submission of items for the agenda).
- b. The candidate must have been a Council member for at least two (2) years and have regularly attended Council meetings.
- c. The Deputy President will be elected for a period of two (2) years only and may serve two (2) consecutive terms.
- d. The election will take place at the council meeting in the year following and the year prior to the congress.

- e. Members of Council will be informed of the names of the candidates together with the agenda of the meeting at which voting will take place.
- f. In the event of the elected Council member leaving Council within the two (2) year period, a replacement will be voted upon.
- g. The election may take place electronically if required, in the event that no Council member wishes to stand for election the Secretary or Treasurer will serve as interim Deputy President until the next Council meeting when an appropriate candidate from within the Council will be elected.
- h. Every effort should be made at the appropriate time, to recruit a Council member to assume the role of Deputy President.
- i. The Deputy President is a Council member whose primary responsibility is to represent his or her country and to take part in the work of the Committees and Networks of the IOA.
- j. The Deputy President is an ex officio member of all committees/projects. [Min (C) 2011; 5.6]

24. Executive Officers of the Council of Management

- A.** The Executive Officers of the Council shall be the:

Secretary
Treasurer

- B.** The Association must have a Secretary. A Council member may also act as Secretary. [Sec. 177 (i)]

C. The Secretary

- 1) The Secretary shall be recruited from the IOA as a whole [Min (C) 2011; 5.1]
- 2) The Secretary should have fluent written and spoken English.
- 3) The Secretary is entitled to attend all General, Council and other committee meetings of the Association, but is not entitled to vote by virtue of her office, unless she is representative of the National Association.
- 4) The Secretary shall be appointed by the Council. The Council in making the appointment shall specify:
 - a. the duration of the appointment
 - b. remuneration
 - c. conditions of service of such appointment [A33]

- 5) The Council may appoint or remove an Assistant or Deputy Secretary. If there is no Secretary capable of acting, the Assistant or Deputy shall act as Secretary to the Association. [Sec. 179] [A33]
- 6) If there is no Assistant or Deputy Secretary capable of acting, any Council member may act if authorised by the Council for a general or specific purpose. [Sec. 177, (2) (a)]

D. The Treasurer

- 1) The Treasurer shall be appointed or removed by the Council. The Council in making the appointment shall specify:
 - a. the duration of the appointment
 - b. conditions of service of such an appointment [A34]
- 2) For practical reasons consideration should always be given to appointing a Treasurer resident in the UK
- 3) The Treasurer must be a current member of the Association

E. Term Renewal for Executive Officers

The COM on its discretion may renew the terms of IOA Executive Officers (President, Secretary and Treasurer) where it considers that such an extension would benefit the IOA. Such discretion will be exercised when the officer concerned has their term of office come to an end and will be made only after the COM reviews the officer's record. Any COM approved renewal will not exceed maximum tenure of the office held. Two terms is the maximum. [Min (C) 2014; 19B]

25. Duties of the President, Deputy President, Secretary, Treasurer and Members of the Council of Management

The duties of the President, the Association's Executive Office Bearers and the Members of the Council of Management are dealt with briefly in the Articles. However, the Council of Management, by resolution, has laid down a code of duties for these persons.

A. President

The duties of the President are:

- 1) to uphold the Constitution of the Association
- 2) to act as President at all General Meetings of the Association and all meetings of the Council
- 3) to strive continually to improve the Association's policy, activities and administration

- 4) to ensure the proper functioning of all committees
- 5) to be an ex officio member of all committees
- 6) to represent the Association at meetings of strabismological associations and other organisations with objects similar to those of the Association
- 7) to ensure that the decisions of the Association and Council are observed and performed
- 8) to do all things necessary to ensure the efficient running of the affairs of the Association
- 9) to liaise with the Deputy President regarding IOA business
- 10) to send a report to the Deputy President on a regular basis, preferably once every other month
- 11) to delegate IOA business to the Deputy President, if and when required

B. Deputy President

The duties of the Deputy President are: [COM approved, March 2014]

- 1) to act as a key ambassador for the Association. As an ambassador, the Deputy President comments on the Association's behalf on board policy issues or specific issues on which he/she has been fully briefed
- 2) in the President's absence, the Deputy President will act as the Deputy Chair for all Annual General, Council of Management, IOA Program Committee or IOA officer's meetings
- 3) to attend all IOA committee meetings as an ex-officio member
- 4) to instigate Presidential election procedure, if necessary
- 5) to liaise with the President in order to better understand the day-to-day running of the Association
- 6) to assist the President at any time if and when required as determined by the President
- 7) to be an ex officio member of all committees/projects [Min (C) 2011; 5.6]

The Deputy President has no "de facto" powers to act on behalf of the Association (i.e., commit the Association to a course of action or expenditure) unless specific authority has been delegated by the IOA President or Council of Management.

C. Secretary

- 1) The **statutory duties** of the Secretary are:
 - a. to distribute through the agency of National Associations:
 1. notice of the AGM and the agenda

- 2. a copy of the AGM minutes
 - b. to maintain the register at the IOA registered office of:
 - 1. names and addresses of Members of the Association
 - 2. names and addresses of the Members of the Council of Management
 - c. to permit the inspection of the register of members of the Association
 - d. to make available for inspection minutes of the General Meetings of the Association
 - e. to notify the Registrar of Companies of any change in the Constitution
 - f. to sign the Annual Return and the accompanying documents
- 2) The **general duties** of the Secretary are: [Min (C) June 1987]
- a. to liaise with the President at all times on matters affecting the conduct of the affairs of the Association
 - b. to administer the Office of the Association and to be responsible for the care and custody of the property and records of the Association, including its Seal, the Register of Members and all records, books and papers belonging to the Association
 - c. to prepare the agenda together with the President; also notice of all meetings of the Association in consultation with the President and to arrange the distribution of any notices
 - d. to prepare the minutes of all General Meetings of the Association and of the Council and to be responsible for the proper distribution or copies of minutes of meetings of the Association, the Council and Committees of the Association
 - e. to carry out the official correspondence of the Association including such matters as:
 - 1. notification on nominations for office, voting papers, and advice of election to office
 - 2. notification of appointments to committee
 - 3. distribution of information with regards to the objects of the committee, duties of members of committees and other relevant information
 - 4. distribution of notices by order of the President or by the Council
 - f. to attend meetings of Standing and Ad Hoc Committees if so directed
 - g. to perform such other duties that the Council may require
 - h. to publish the Association's name outside its registered office, on its Seal and on its publications

- i. to verify the statement to be submitted to the Official Receiver in the event of dissolution of the Association by the court
- j. to keep and make available for inspection the register of interests of all members of the Council of Management
- k. to permit the inspection by members of the Association of copies of contracts of the Council of Management [Min (C) 1987; 2]

D. Treasurer

The duties of the Treasurer are:

- 1) to keep true and accurate account of all receipts and disbursements of the Association and of the Council
- 2) to collect all monies paid to the Association including all subscriptions, dues, or levies payable by members of the Association, and National Associations
- 3) to open and maintain a bank account or accounts in the name of and on behalf of the Association and to ensure that all monies are properly and punctually paid to the credit of such account or accounts
- 4) Investments – it is the Treasurer’s responsibility to present to the Council and the Honorary Officers information regarding investments and to act at all times with the approval of the Council. If professional advice is required, this must be agreed in advance by the Council
- 5) to submit to the Council annually and on request a detailed balance sheet and report in writing of the financial affairs of the Association
- 6) to submit annually for the approval of Council a budget for the following year. Expenses not provided for in the budget up to a stated sum in any one year can be incurred only with the approval of Council
- 7) to have the accounts audited annually by a certified accountant or professional auditor
- 8) to present the balance sheet and report to the AGM of the Association
- 9) to distribute through the agency of the National Associations a copy of the balance sheets and a copy of the auditor’s report
- 10) To send a copy of the annual return to the Companies House and to the Charities Commission.

E. Members of the Council of Management

The duties of the Members of the Council of Management are:

- 1) to attend Council meetings
- 2) to keep their respective National Associations informed of the activities of the Association and ensure that such National Associations are

provided with copies of minutes of General Meetings, balance sheet and a statement of income and expenditures of the Association

- 3) to ensure that a report of the activities of the Association is presented to the AGM of their respective National Association
- 4) to liaise with their National Association and committees thereof in order that the views of the National Associations and committees may be communicated to the Association and the Council
- 5) to provide agenda items for the Secretary
- 6) to provide the President with items for inclusion in the Association's "website news"
- 7) to liaise with their respective successor, upon conclusion of the term of office as a National Representative, and to provide their successor with an up to date précis of the activities of the Association and its Council as well as:
 - a. the copy of the Association's Memorandum and Articles
 - b. the copy of the Handbook
 - c. copies of minutes of meetings of the Council and the Association
 - d. balance sheets, other financial statements and all other matters relating to the office of Council members



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IOA PROGRAMS, COMMITTEES & GROUPS

(Sections 26-31)

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26. Program Based Structure [COM approved, June 2013]

Historically, Association work has been carried out by its standing, ad hoc and special committees and networks. In June 2013, the IOA Council of Management approved a restructuring of Association governance to a Program-based model. Using this model, all strategic planning and committee/network or project work would be carried out under five (5) program areas or portfolios that were aligned with the Association's vision and mission. The five (5) program areas which work together to meet the aims and objectives of the Association are:

- A.** Operations Management (see Section 27A)
- B.** Education and Research (see Section 27B)
- C.** Standards and Quality (see Section 27C)
- D.** International Cooperation (see Section 27D)
- E.** Promotions and Development (see Section 27E)



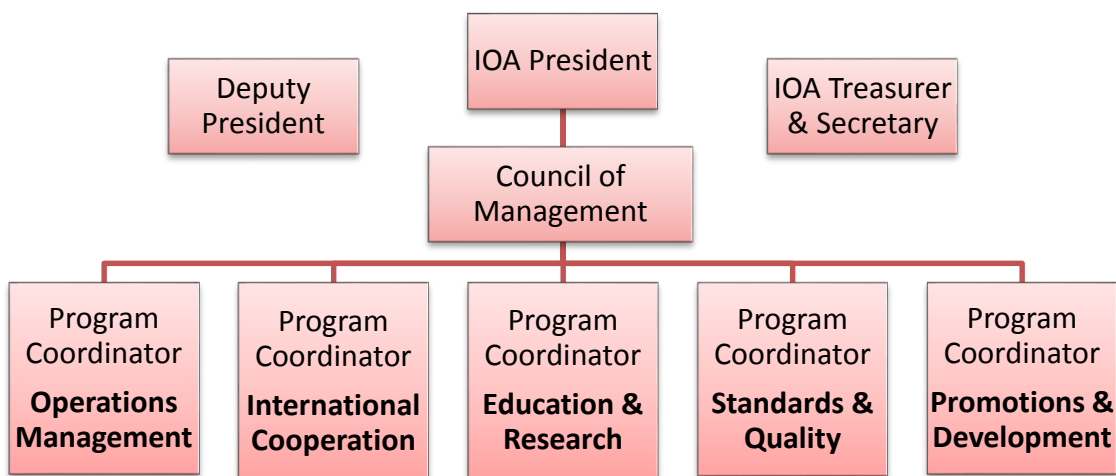
F. What is Program Based Management Structure?

Program Based Management Structure is a form of governance where major Association initiatives are identified; and the collection of aligning projects with a common goal or success vision are organized within portfolios (also known as program areas). Each program area is an essential element in the overall strategy and direction of the Association. The Program Based Structure facilitates the coordination and implementation of related project activities.

G. Program Area Governance

Executive level oversight of IOA program areas is provided by the IOA Council of Management and its Executive. They ensure that as each program evolves, its project work continues to align with the Association's strategic direction. The work of each program is carried out by program coordinators, project leaders/committee chairs, and team and committee members. Program Coordinators oversee the function of time-limited projects which are guided by project plans. While specific project teams evolve and dissolve as needed, the core program areas remain a constant.

H. IOA Organizational Chart



- 1) The IOA President and Deputy President are ex officio members of all IOA projects/committees.
- 2) The IOA Treasurer acts as the treasurer of each of the five IOA Programs. All program and project planning should include a financial plan and conform to Association fiscal practices and controls.
- 3) The IOA Secretary will carry out program area duties in keeping with the secretarial position description in the handbook.

27. IOA Programs [COM approved, June 2013]

Contained in each program area is a collection of projects with a common goal or success "vision" under an integrated framework. These projects consist of human and financial resources and processes aimed at implementing strategic objectives. For specific IOA program area projects, please refer to the 2013-2017 IOA Strategic Plan.

A. Operations Management

- 1) Vision Statement: Our Association is a strong, professional, ethical, proactive and assertive association. It is managed democratically and provides its services in a cost-effective manner. Our Association provides the international voice of orthoptics through its congresses, publications, council meetings and representation in international forums.
- 2) Current committees/projects:
 - a. Finance Committee
 - b. Website Committee
 - c. Membership Committee
 - d. Congress Organizing Committee (COC)
 - e. Congress Scientific Program Committee (CSPC)
 - f. Congress Education Forum Committee
 - g. Single Professional Congress Organizer (PCO)

B. Education and Research

- 1) Vision Statement: All of the countries in the world will have their own orthoptic education programmes, which meet international minimum standards. The minimum standards will allow the educational curricula to be responsive to the needs and demands of each country. The orthoptic programmes will cooperate with one another. All orthoptists will have access to further professional education and development, and higher degrees. Orthoptists will participate in research and develop research opportunities in all countries in the world, and will have access to information about research from all parts of the world. The value of orthoptics worldwide shall be recognised through evidence-based practice supported by research documentation.
- 2) Current committees/projects:
 - a. Committee to develop guidelines for establishing an entry-level orthoptic education program and standards
 - b. Guidelines for IOA Congresses and IOA Symposia
 - c. Committee to develop resources for advanced education and research skills
 - d. Develop position statements:
 1. Research/Evidence-Based Practice
 2. Role of Professional Support
 3. Continuing Professional Development

C. Standards and Quality

- 1) Vision Statement: There will be high standards of practice and ethics in orthoptics worldwide. Orthoptics will be defined as a unique profession, which cooperates with other professions in mutual respect. Orthoptists

will encourage quality development in their professional work, and further their professional development on a regular basis.

- 2) Current committees/projects:
 - a. Code of Ethics Review
 - b. Committee to develop entry-level competencies for Orthoptics
 - c. Low Vision Committee
 - d. Vision Screening Committee

D. International Cooperation

- 1) Vision Statement: Orthoptics will be well recognized, known and used as an accepted profession in all countries in the world. International communication will occur within a spirit of cooperation. This will lead to orthoptists having an influence on decisions made by decision-makers internationally regarding orthoptics in eye health issues, education issues, research issues, practice and availability.
- 2) Current committees/projects:
 - a. Partner Country Program
 - b. Partner Program Restructuring Committee
 - c. Exchange/Host Program
 - d. Volunteer Program
 - e. Volunteer Application Review Committee (Review Board)
 - f. Orthoptic Worldwide Survey (OWWS) (ad hoc)
 - g. Memorandum of Understanding document with key paediatric ophthalmology associations

E. Promotions and Development

- 1) Vision Statement: Orthoptics will be available world-wide, supported by national orthoptic associations, which are members of the IOA.
- 2) Current committees/projects:
 - a. Recognition Committee
 - b. Committee to Develop a Resource Guide for Establishing an Orthoptic Association
 - c. Social Media Reporter Program
 - d. World Orthoptic Day
 - e. Terminology Committee (ad hoc)

28. IOA Program Coordinators – Role & Selection

[COM approved, June 2013]

The International Orthoptic Association (IOA) uses a program management structure. There are five program areas which work together to meet the aims and objectives for the organisation. The work is carried out by Program Coordinators (PCo's), project/committee chairmen and project/committee team members. The PCo's oversee ongoing functions and time limited project teams and ongoing committee work which are guided by specific project plans.

A. Responsibilities of Program Coordinators (PCo's)

- 1) Monitor projects in the Program Area to ensure that all projects in the program area keep to time, budget, have sufficient manpower and meets the organizational objectives of the IOA as outlined in the 2013-2018 Strategic Plan.
- 2) Develops a plan for his or her program area.
- 3) Submit an annual written report to the IOA President and Secretary at least three (3) weeks prior to the annual Council of Management meeting. The report should include Program activities and expenses for the past year; any motions requiring action; and budget needs and recommendations for the upcoming year.

B. Program Coordinator Selection

- 1) Nominations are sought from the IOA Council of Management members for individuals interested in Program Coordinator positions.
- 2) Council of Management members with relevant experience and interest are encouraged to submit their names for consideration.
- 3) When more than one Council Member submits their name, the Council of Management will vote on who will fill the role.

C. Term of Office

Program Coordinators will serve in their role for the period of the IOA Strategic Plan (4 years) that is in place to fulfil its objectives.

29. Committee/Project Chairman Responsibilities

All committee and project chairs are expected to act as a guide and work with their members to develop necessary work plans and meeting agendas. Responsibilities include:

- A.** Ensure that each committee member receives a description of the task they are to complete, provide committee members with a role description, anticipated work commitment and projected project timeline.

- B.** Work with committee members to determine the human and financial needs of their project.
- C.** Consult with the Program Coordinator and IOA Treasurer on projected project expenses.
- D.** Approve minutes and reports of committee meetings before their distribution.
- E.** Ensure all committee members, the Program Coordinator, IOA President and Deputy President are included in all committee correspondence.
- F.** Report to the Program Coordinator on decisions that affect the committee's work.
- G.** Where appropriate, guide the committee in proposing new activities and service that will further the mission and goals of the Association.
- H.** Where appropriate, make policy recommendations to the Program Coordinator for transmission to the IOA President and Council of Management.
- I.** Uphold the values and objectives of the Association
- J.** Act with integrity and avoid or declare personal conflicts of interest.
- K.** Give adequate time and energy to the duties of membership.
- L.** Review all relevant material before face-to-face committee meetings or participating in online discussion.
- M.** Attend face-to-face committee/project meetings where possible or participate in online discussions and voice objective opinions on issues.
- N.** Support the efforts of the Program Coordinator and carry out individual assignments made by the Program Coordinator.
- O.** Pay attention to Association activities that affect or are affected by the committee's work.
- P.** Respect the input and participation of everyone involved in each phase of the committee's work. Confidentiality must be maintained on committee work as it applies to sensitive Association matters. If there is any doubt at any time about the information that may be shared outside of the committee, members will seek the advice of the Program Coordinator and IOA President.

- NOTE: In the case of a serious breach of confidentiality, lack of performance, or lack of respect for committee member input, the Program Coordinator and IOA President are to be notified. The committee may be dissolved and a committee of new members convened; or an individual committee member or chair may be replaced.
- Q.** Make decisions as a collective team and hold joint responsibility for the work completed and decisions and actions of the committee/project team.
 - R.** In the case of equality of votes the IOA President will cast a vote. The IOA President and Deputy President are ex officio members of all IOA committees or project teams.
 - S.** The chair will dissolve the committee/project team when their assigned task is completed or make recommendations for the committee's ongoing existence to the Program Coordinator.
 - T.** The chair will submit an annual written report to the IOA President, Secretary and Program Coordinator at least three (3) weeks prior to the annual Council of Management meeting. The report should include committee/project activities and expenses for the past year; any motions requiring action; and budget needs and recommendations for the upcoming year.

30. Committee/Project Member Responsibilities

Members of all committees and projects have the following responsibilities:

- A.** Uphold the values and objectives of the Association.
- B.** Act with integrity and avoid or declare personal conflicts of interest.
- C.** Give adequate time and energy to the duties of membership.
- D.** Review all relevant material before face-to-face committee meetings or participating in online discussion.
- E.** Attend face-to-face committee/project meetings where possible or participate in online discussions and voice objective opinions on issues.
- F.** Support the efforts of the committee/project chair and carry out individual assignments made by the chair.
- G.** Pay attention to Association activities that affect or are affected by the committee's work.

- H.** Respect the input and participation of everyone involved in each phase of the committee's work. Confidentiality must be maintained on committee work as it applies to sensitive Association matters. If there is any doubt at any time about the information that may be shared outside of the committee, members will seek the advice of the committee chair.
 - NOTE: In the case of a serious breach of confidentiality, lack of performance, or lack of respect for committee member input, the Program Coordinator and IOA President are to be notified. The committee may be dissolved and a committee of new members convened; or an individual committee member or chair may be replaced.
- I.** Make decisions as a collective team and hold joint responsibility for the work completed and decisions and actions of the committee/project team.
- J.** In the case of equality of votes the IOA President will cast a vote. The IOA President and Deputy President are ex officio members of all IOA committees or project teams.

31. IOA Social Media Reporters [Min (C) 2013; 29]

IOA Social Media Reporters are IOA members from around the globe who commit to making a minimum of three (3) postings per year on IOA Social Media (Facebook, LinkedIn and Twitter). IOA Social Media Reporters will ideally hail from each continent in the world that encompasses an IOA member country.

A. Appointment of reporters

IOA Social Media Reporters are nominated by a Council of Management Member or by their National Association.

B. Preferred experience / Skills for this role

- 1) Reporters should be comfortable with social media use
- 2) Reporters should be aware of events, meetings and publications relating to orthoptics in their country and surrounding countries
- 3) It is considered an asset for reporters to have current or former involvement with social media for IOA member associations or other ophthalmic associations

C. Term of Service

The IOA Social Media Reporter's term of service is for two (2) years with an option to renew. This is a voluntary position with no remuneration associated.

D. Using IOA Social Media by IOA Social Media Reporters

1) **IOA Twitter Account**

Postings should be reserved for announcements of the following:

- a. IOA Congress important dates (registration deadlines, abstract openings)
- b. World Orthoptic Day activities
- c. Member association events
- d. Significant awards/honors to orthoptic members
- e. Noteworthy publications of interest to the global orthoptic community

2) **IOA LinkedIn Group**

Content ideally should be limited to the following items:

- a. Orthoptics/Ophthalmology/Vision Science Meetings (regional, national and international) of interest to the global orthoptic community.
 1. Registration or abstract submission deadlines
 2. Interesting presentations given a meeting
 3. Meeting highlights including social program
- b. Awards/commendations to orthoptists and/or supporters of orthoptics.
- c. Obituary notices of orthoptists who significantly contributed to the profession.
- d. Publications
 1. Journal articles
 2. Textbooks
 3. Newspaper stories or broadcasts of note
- e. Opportunities for continuing professional development via workshops, webinars or online courses
- f. Changes in legislation related to orthoptics
- g. Developments in orthoptic education
- h. Development in orthoptics/eye care research
- i. New technology changing practice
- j. Pose interesting questions related to eye care/research/orthoptic education
- k. World Orthoptic Day activities

3) **IOA Facebook Page**

Postings could include all of the above plus interesting human interest pieces related to orthoptic work/eyecare/vision science. See *IOA Rules of Social Media Engagement* as it relates to photo consent & professionalism.

E. IOA Rules of Social Media Engagement

IOA Social Media Reporters are asked to adhere to the following:

- 1) IOA Social Media Reporters bring news or pose questions; reporters should not feel obligated to lead discussions.
 - a. Build a social media community by posting content that invites responses so members stay engaged.
 - b. Try to frame what you write to invite differing points of view.
- 2) IOA Social Media Reporters are asked to reveal any conflicts of interest that could influence our understanding or use of the information, product or service mentioned in social media posting
- 3) The IOA supports transparency and is committed to clear disclosure of relationships and endorsements. The IOA does not endorse IOA Social Media Reports being contracted, seeded, or in any way compensated to create IOA social media to endorse products or services. Take care to avoid posting links that refer to for-profit websites.
- 4) IOA Social Media Reporters will not solicit donations for causes that have not been pre-approved by the IOA.
- 5) IOA Social Media Reporters are asked to follow behavioural and professional standards of behaviour on IOA Social Media.
- 6) Patient privacy and confidentiality must be maintained. Avoid any use of patient identifiers and don't post videos or pictures of patients.
- 7) As a courtesy to colleagues, IOA Social Media Reporters are asked to avoid posting pictures or videos on IOA Social Media without securing verbal or written permission to ensure privacy of individuals by not sharing personal contact information with IOA Social Media groups. Orthoptic social events are fun to capture with digital images but make sure the photos posted to the IOA Facebook are family friendly.
- 8) Questions related to issues about patient care can be discussed but explicit medical advice should be avoided as a correct diagnosis and treatment regime should only be provided in a care-giver capacity when a comprehensive examination has been completed.
- 9) IOA Social Media Reporters are encouraged to write in the first person and stick to personal areas of expertise.
- 10) IOA Social Media Reporters are asked to avoid any discussion of potentially politically sensitive material on IOA Social Media as this is not the correct forum and could be harmful to negotiations of that you are unaware. If it is material that gives you pause, then don't publish it. If in doubt, check first with the IOA President or an IOA Council of Management member.



INTERNATIONAL
ORTHOPTIC
ASSOCIATION

MEMBERSHIP

(Sections 32-36)

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32. Current IOA Member Countries

A. Full Member Countries

<u>Country</u>	<u>National Association</u>
Australia	Orthoptics Australia (OA)
Austria	Verband der Orthoptistinnen und Orthoptisten Österreichs
Belgium	Belgische Orthoptische Vereniging / Association Belge d'Orthoptie
Canada	The Canadian Orthoptic Society (TCOS)
France	Association Française d'Orthoptique
Germany	Berufsverband der Orthoptistinnen Deutschlands e. V. (BOD)
Italy	Associazione Italiana Ortottisti Assistenti in Oftalmologia (AIOrAO)
Japan	Japanese Association of Certified Orthoptists (JACO)
The Netherlands	Nederlandse Vereniging van Orthoptisten (NVvO)
Portugal	Associação Portuguesa de Ortoptistas (APOR)
Scandinavia	Scandinavian Orthoptic Association (SOA)
SOA: Denmark	Dansk Medicinsk Ortoptisk Forening (DMOF)
SOA: Norway	Norske Ortoptisters Forening (NOF)
SOA: Sweden	Sveriges Ideella Ortoptistförening (SIOF)
Switzerland	<u>German:</u> Schweizerischer Verband der Orthoptistinnen und Orthoptisten (SVO) <u>French:</u> Association Suisse des Orthoptistes (ASO)
United Kingdom & Ireland	British & Irish Orthoptic Society (BIOS)

United States of America American Association of Certified Orthoptists (AACO)

B. Associate Member Countries

<u>Country</u>	<u>National Association</u>
Asia Pacific	Asia Pacific Orthoptic Association (APOA)
Brazil	Conselho Brasileiro de Ortóptica (CBOrt)
Czech Republic	Česká společnost ortoptistek (CSO)
Hong Kong	The Hong Kong Orthoptist Association
India	Indian Council of Orthoptics (ICO)
Israel	Israel Orthoptic Society (IOS)
New Zealand	New Zealand Orthoptic Society Incorporated (NZOSI)
Pakistan	Orthoptic wing of: The Society of Optometrists, Orthoptists & Ophthalmic Technologist Pakistan (SOOOP)
South Africa	South African Orthoptic Society (SAOS)

33. National Associations as Agents of the Association

- A.** The Association is constituted under the companies Act of The United Kingdom and the law governing this act requires that each member of the Association receives certain documentation in respect to the conduct of affairs of the Association. In addition the Association is required to maintain a register of its members.
- B.** Due to the large membership of the Association which is spread world-wide, the secretariat had difficulty ensuring that these requirements were adequately met. The Association's legal advisors were consulted and recommended that National Associations be asked to act on behalf of the Association to ensure that members received the appropriate documentation.
- C.** National Associations were informed of this advice and at the 1986 Annual General Meeting in Munich (Germany) a resolution was passed unanimously making National Associations agents of the International Orthoptic Association, and the responsibilities are detailed below.

- D.** The duties of the National Associations as agents of the International Orthoptic Association are:
- 1) to help maintain the Association's register of members by supplying an up to date list of names and addresses of members of National Associations who are therefore members of the Association (this list may be sent to the Secretary in the format used in each country, e.g. the Japanese list may be in Japanese)
 - 2) to pay appropriate subscriptions and levies on behalf of its Association members
 - 3) to send to their Association members copies of:
 - a. a notice of the AGM and agenda
 - b. the balance sheet or a précis
 - c. the AGM minutes or a précis
 - d. information about International Orthoptic Congresses and other information as appropriate
- E.** In addition to the duties required of National Associations as agents of the Association, it is expected that National Associations will:
- 1) ensure that the National Representative will usually attend every Council meeting
 - 2) encourage the National Representative on the Council to attend as many Council meetings and AGM's as possible over and above the required two (2) out of four (4) meetings [Min (C) 1991; 4.3]
 - 3) ensure that the country's views on important issues are made known by post or by proxy if the representative is unable to attend

The accidental omission by a National Association acting as an agent for the Association to give notice of a meeting, or the non-receipt of such notice by any person entitled to receive the notice shall not invalidate any resolution passed, or any proceedings at any meeting. [A9]

34. Membership

Membership of the Association is open to orthoptists on proof of qualification and is also open to ophthalmologists at the discretion of the Council. [A5] (See Section 35 and Appendices A-D).

- A.** The five (5) kinds of membership are:
- 1) Full membership (National Associations)
 - 2) Associate membership (National Associations)
 - 3) Individual membership (for orthoptists from non IOA countries)
 - 4) Associate membership (ophthalmologists)

5) Affiliates

- B.** The number of members is at the discretion of the Council.
- C.** The Association shall maintain a register of members which shall be kept by the Secretary.
- D.** The subscribers to the Memorandum and Articles were:
Barbara M. Lee, Attie S. Van Paassen, Nancy Capobianco, Evelyn Ross, Hildegard Forrer, Mireille Louly, Geraldine L. Wilson, Cacilda Gallo, Simone Readman, Mary E. Wesson.
- E.** The original National Associations recognised by the Association in 1967 were from the following countries:
Australia, Brazil, Canada, France, Holland, Switzerland and the United Kingdom. [Min (C) 1968; 4]
- F.** The following persons were named in the Articles as the first members of the Council in 1974:
Miss Patricia Lance, Australia, Mrs. Cacilda Gallo, Brazil, Miss Barbara Lee, United Kingdom, Miss Attie Van Paassen, Holland, Mrs. Evelyn Ross, Canada, Miss Mireille Louly, France, Miss Hildegard Forrer, Switzerland, Miss Nancy Capobianco, USA. [A31 (a)]
- G.** The Association is registered as a company limited by guarantee. Accordingly no shares are issued to members, but each member agrees that in the event of the Association being dissolved, each member shall contribute towards outstanding debts and expenses, an amount not to exceed (UK) £1. The member's liability continues while he remains a member of the Association and for a period of one (1) year after he ceases to be a member. [M6]
- H.** Termination of Membership [COM approved, March 2014]
- 1) Individual Members or Member Organizations (Full or Associate) may terminate membership at any time but must do the following:
 - a. Provide a written notice of resignation to the IOA President and Secretary before October 31st of the year of resignation.
 - b. Pay subscription fee for the following year if notice of resignation is received after October 31st.
 - 2) The IOA Council of Management reserves the right to review and terminate membership based on any of the following:
 - a. The IOA Council of Management or IOA officers receive a complaint or evidence is uncovered that an Individual Member or Member

- Organization (Full or Associate) brings disrepute and/or produces harm to the orthoptic profession.
- b. An Individual Member or Member Organization (Full or Associate) fails to maintain the terms of reference for their membership.
 - c. An Individual Member or Member Organization (Full or Associate) has not paid subscriptions by year end following every reasonable attempt at contact by the IOA officers.
 - d. A Member Organization (Full or Associate) does not respond to direct inquiries from IOA officers or ceases communications with the IOA.
 - e. A Full Member Organization has not provided representation at a minimum of two Council of Management meetings during a four-year period.
- 3) The voting members of the Council of Management will decide if termination of membership is necessary.
- a. Member Organizations under review will not be allowed to vote.
 - b. The Council of Management will work with Member Organizations to try to prevent termination. Full Member Organizations may be offered Associate Membership if they meet the terms for Associate Membership.
 - c. Any voting member of the Council of Management may propose termination of membership and two-thirds (2/3) of Council must approve. [Min (C) 2014; 18B]
- I. Appeal Process for Termination of Membership [Min (C) 2015; 11D3]: A member or full member or associate member may seek to appeal the IOA Council of Management's (COM) decision to terminate their membership.
- 1) They must appeal the termination in writing within thirty (30) calendar days of receipt of the notice of termination.
 - a. The appeal must be sent to both the IOA President and the IOA Secretary.
 - b. The appeal will include the specific reason(s) it is believed that the termination is unwarranted.
 - 2) Upon receipt of the appeal, the President will immediately notify the COM of the appeal.
 - a. Within thirty (30) days of making the appeal, the COM will discuss the termination in person or online and make a determination based on the appeal and evidence presented that resulted in the appeal.
 - b. The terminated member or full member or associate member has the burden of demonstrating why the termination was unwarranted.

- c. At the discretion of the COM, the COM and/or the terminated member or full member or associate member may ask other relevant parties to respond to questions or provide additional information.
 - 3) The IOA President will inform the appellant of the COM's decision in writing. The decision of the COM is final.
 - 4) Full member associations who have their membership terminated due to inability to meet the expectations of full membership status will be offered associate membership status. The Membership Committee reserves the right to investigate the ability of the terminated member association to meet associate membership status.
- J.** Consortiums or country partnerships may be considered for full or associate membership. Such membership would be granted single nation status [Min (C) 2015; 11B4].

35. IOA Membership Categories – Terms of Reference

A. Full Membership *(See Appendix A for application form)*

- 1) Full membership of the IOA gives a National Association a seat on the Council.
- 2) Full membership requires:
 - a. existence of a National training programme with an acceptable syllabus
 - b. nationally recognised qualifications
 - c. a National Association
 - d. attendance at Council meetings
- 3) There is no requirement of a minimum number of members of the National Association.
- 4) A National Association should exist at least three (3) years before applying for Full membership. [A5]
- 5) The Association's aims should be:
 - a. promotion of scientific and practical continuing education of its membership
 - b. promotion of economic and social professional standards and support to its members
 - c. satisfactory completion of the IOA application procedure
 - d. undertake that the National Representative will usually attend every Council meeting
- 6) Education criteria for the National Association are:

- a. the existence of at least one (1) nationally recognised orthoptic education programme
 - b. the existence of an official certificate of graduation
 - c. the existence of an acceptable syllabus
- 7) Subscription rates will be determined annually by the Council of Management and will be in line with the inflation rate in the United Kingdom.
- 8) A current membership list will be sent annually to the Secretary and Treasurer of the IOA.
- 9) Any change in the structure of the national orthoptic association or national education program should be reported to the IOA President.
- 10) Termination of Membership: [COM approved, March 2014]
- a. Full Member Organizations may terminate membership at any time but must do the following:
 - 1. Provide a written notice of resignation to the IOA President and Secretary before October 31st of the year of resignation.
 - 2. Pay subscription fee for the following year if notice of resignation is received after October 31st.
 - b. The IOA Council of Management reserves the right to review and terminate membership based on any of the following:
 - 1. The IOA Council of Management or IOA officers receive a complaint or evidence is uncovered that a Full Member Organization brings disrepute and/or produces harm to the orthoptic profession.
 - 2. A Full Member Organization fails to maintain the terms of reference for their membership.
 - 3. A Full Member Organization has not paid subscriptions by year end following every reasonable attempt at contact by the IOA officers.
 - 4. A Full Member Organization does not respond to direct inquiries from IOA officers or ceases communications with the IOA.
 - 5. A Full Member Organization has not provided representation at a minimum of two Council of Management meetings during a four-year period.
 - d. The voting members of the Council of Management will decide if termination of membership is necessary.
 - 1. Member Organizations under review will not be allowed to vote.
 - 2. The Council of Management will work with Member Organizations to try to prevent termination. Full Member Organizations may be offered Associate Membership if they meet the terms for Associate Membership.

3. Any voting member of the Council of Management may propose termination of membership and two-thirds (2/3) of Council must approve. [Min (C) 2014; 18B]
- 11) Full Membership entitles all members of the National Association to a reduced registration fee for the IOA Congress.
 - 12) Appeal Process for Termination of Membership [Min (C) 2015; 11D3]: A full member may seek to appeal the IOA Council of Management's (COM) decision to terminate their membership.
 - a. They must appeal the termination in writing within thirty (30) calendar days of receipt of the notice of termination.
 1. The appeal must be sent to both the IOA President and the IOA Secretary.
 2. The appeal will include the specific reason(s) it is believed that the termination is unwarranted.
 - b. Upon receipt of the appeal, the President will immediately notify the COM of the appeal.
 1. Within thirty (30) days of making the appeal, the COM will discuss the termination in person or online and make a determination based on the appeal and evidence presented that resulted in the appeal.
 2. The terminated full member has the burden of demonstrating why the termination was unwarranted.
 3. At the discretion of the COM, the COM and/or the terminated full member may ask other relevant parties to respond to questions or provide additional information.
 - c. The IOA President will inform the appellant of the COM's decision in writing. The decision of the COM is final.
 - d. Full member associations who have their membership terminated due to inability to meet the expectations of full membership status will be offered associate membership status. The Membership Committee reserves the right to investigate the ability of the terminated member association to meet associate membership status.

B. Associate Membership – National Orthoptic Associations
(see Appendix A for application form)

- 1) Associate membership is open to National Orthoptic Associations with members of that association holding an official graduation certificate.
- 2) The National Association must meet the following criteria:
 - a. have been in existence for a minimum of three (3) years [A5]
 - b. have no nationally recognised education programme in their country

or

- c. who fulfil the criteria for Full Membership, but who are unable to meet the financial obligations and specified attendance duties of Full Membership
- 3) Associate membership requires the National Association to nominate one (1) member who is to be responsible for liaison to the IOA Council and who:
 - a. may attend Council of Management meetings as an observer
 - b. holds no voting privileges on the IOA Council
 - c. is responsible for the submission of issues for discussion on Council of Management agenda that are applicable to their National Association
 - d. is permitted to speak to agenda topics
 - 4) Associate membership is not available to National Associations who fail to meet the IOA established criteria.

The National Association's aims should be:

- a. promotion of scientific and practical continuing education of its membership
 - b. promotion and dissemination of professional standards and support to its members in their practice of orthoptics
 - c. satisfactory completion of the IOA application form
- 5) Subscription rates will be determined annually by the Council of Management and will be in line with the inflation rate in the United Kingdom.
 - 6) Orthoptist Associate members of National Associations have the right to vote at the AGM.
 - 7) National Associations who are Associate Members of the IOA will receive a copy of the Council of Management agenda and minutes even if they do not attend the meeting.
 - 8) Any change in the structure of the national orthoptic association should be reported to the IOA President.
 - 9) Termination of Membership: [COM approved, March 2014]
 - a. Associate Member Organizations may terminate membership at any time but must do the following:
 1. Provide a written notice of resignation to the IOA President and Secretary before October 31st of the year of resignation.
 2. Pay subscription fee for the following year if notice of resignation is received after October 31st.
 - b. The IOA Council of Management reserves the right to review and terminate membership based on any of the following:
 1. The IOA Council of Management or IOA officers receive a complaint or evidence is uncovered that an Associate Member

- Organization brings disrepute and/or produces harm to the orthoptic profession.
2. An Associate Member Organization fails to maintain the terms of reference for their membership.
 3. An Associate Member Organization has not paid subscriptions by year end following every reasonable attempt at contact by the IOA officers.
 4. An Associate Member Organization does not respond to direct inquiries from IOA officers or ceases communications with the IOA.
- c. The voting members of the Council of Management will decide if termination of membership is necessary.
1. Member Organizations under review will not be allowed to vote.
 2. The Council of Management will work with Member Organizations to try to prevent termination.
 3. Any voting member of the Council of Management may propose termination of membership and two-thirds (2/3) of Council must approve. [Min (C) 2014; 18B]
- 10) Associate Membership entitles all members of the National Association to a reduced registration fee for the IOA Congress.
- 11) Appeal Process for Termination of Membership [Min (C) 2015; 11D3]: An associate member may seek to appeal the IOA Council of Management's (COM) decision to terminate their membership.
- a. They must appeal the termination in writing within thirty (30) calendar days of receipt of the notice of termination.
 1. The appeal must be sent to both the IOA President and the IOA Secretary.
 2. The appeal will include the specific reason(s) it is believed that the termination is unwarranted.
 - b. Upon receipt of the appeal, the President will immediately notify the COM of the appeal.
 1. Within thirty (30) days of making the appeal, the COM will discuss the termination in person or online and make a determination based on the appeal and evidence presented that resulted in the appeal.
 2. The terminated associate member has the burden of demonstrating why the termination was unwarranted.
 3. At the discretion of the COM, the COM and/or the terminated associate member may ask other relevant parties to respond to questions or provide additional information.
 - c. The IOA President will inform the appellant of the COM's decision in writing. The decision of the COM is final.

C. Individual Membership – Orthoptists *(see Appendix B for application form)*

- 1) Individual Membership is open to orthoptists:
 - a. who are unable to belong to a National Association
 - or**
 - b. whose National Association is not a Full or Associate member of the IOA
- 2) Criteria to be fulfilled by the professional are the same as those for Full Membership, including the educational criteria.
- 3) Individual membership does not include a seat or observer status on the Council of Management.
- 4) Individual members have the same rights as do national members except as stated above.
- 5) Subscription rates will be determined annually by the Council of Management and will be in line with the inflation rate in the United Kingdom.
- 6) The professional is required to send a copy of diploma or certificate to the IOA.
- 7) Membership entitles the individual orthoptist member to a reduced IOA Congress fee and a copy of the IOA Congress Transactions.
- 8) Termination of Membership: [COM approved, March 2014]
 - a. Individual Members may terminate membership at any time but must do the following:
 1. Provide a written notice of resignation to the IOA President and Secretary before October 31st of the year of resignation.
 2. Pay subscription fee for the following year if notice of resignation is received after October 31st.
 - b. The IOA Council of Management reserves the right to review and terminate membership based on any of the following:
 1. The IOA Council of Management or IOA officers receive a complaint or evidence is uncovered that an Individual Member brings disrepute and/or produces harm to the orthoptic profession.
 2. An Individual Member fails to maintain the terms of reference for their membership.
 3. An Individual Member has not paid subscriptions by year end following every reasonable attempt at contact by the IOA officers.
 - c. The voting members of the Council of Management will decide if termination of membership is necessary.

- 9) Appeal Process for Termination of Membership [Min (C) 2015; 11D3]:
A member may seek to appeal the IOA Council of Management's (COM) decision to terminate their membership.
 - a. They must appeal the termination in writing within thirty (30) calendar days of receipt of the notice of termination.
 1. The appeal must be sent to both the IOA President and the IOA Secretary.
 2. The appeal will include the specific reason(s) it is believed that the termination is unwarranted.
 - b. Upon receipt of the appeal, the President will immediately notify the COM of the appeal.
 1. Within thirty (30) days of making the appeal, the COM will discuss the termination in person or online and make a determination based on the appeal and evidence presented that resulted in the appeal.
 2. The terminated member has the burden of demonstrating why the termination was unwarranted.
 3. At the discretion of the COM, the COM and/or the terminated member may ask other relevant parties to respond to questions or provide additional information.
 - c. The IOA President will inform the appellant of the COM's decision in writing. The decision of the COM is final.

D. Associate Membership – Ophthalmologists (*see Appendix C for application form*)

Associate Membership is open to ophthalmologists.

- 1) Membership entitles the Associate ophthalmologist member to a reduced IOA Congress registration fee and a copy of IOA Congress Transactions.
- 2) Associate ophthalmologist members are not entitled to vote at the Annual General Meeting nor are they entitled to hold a seat on the IOA Council of Management.
- 3) Subscription rates will be determined annually by the Council of management and will be in line with the inflation rate in the United Kingdom.
- 4) Termination of Membership: [COM approved, March 2014]
 - a. Individual Members may terminate membership at any time but must do the following:
 1. Provide a written notice of resignation to the IOA President and Secretary before October 31st of the year of resignation.
 2. Pay subscription fee for the following year if notice of resignation is received after October 31st.

- b. The IOA Council of Management reserves the right to review and terminate membership based on any of the following:
 - 1. The IOA Council of Management or IOA officers receive a complaint or evidence is uncovered that an Individual Member brings disrepute and/or produces harm to the orthoptic profession.
 - 2. An Individual Member fails to maintain the terms of reference for their membership.
 - 3. An Individual Member has not paid subscriptions by year end following every reasonable attempt at contact by the IOA officers.
 - c. The voting members of the Council of Management will decide if termination of membership is necessary.
- 5) Appeal Process for Termination of Membership [Min (C) 2015; 11D3]: A member may seek to appeal the IOA Council of Management's (COM) decision to terminate their membership.
- a. They must appeal the termination in writing within thirty (30) calendar days of receipt of the notice of termination.
 - 1. The appeal must be sent to both the IOA President and the IOA Secretary.
 - 2. The appeal will include the specific reason(s) it is believed that the termination is unwarranted.
 - b. Upon receipt of the appeal, the President will immediately notify the COM of the appeal.
 - 1. Within thirty (30) days of making the appeal, the COM will discuss the termination in person or online and make a determination based on the appeal and evidence presented that resulted in the appeal.
 - 2. The terminated member has the burden of demonstrating why the termination was unwarranted.
 - 3. At the discretion of the COM, the COM and/or the terminated member may ask other relevant parties to respond to questions or provide additional information.
 - c. The IOA President will inform the appellant of the COM's decision in writing. The decision of the COM is final.

E. Affiliate *(see Appendix D for application form)*

Affiliation to the IOA may be offered at the sole discretion of the Council of Management of the IOA to individuals working in the field of orthoptics.

- 1) Consideration for eligibility for affiliation is dependent upon the following criteria:
 - a. the applicant has an exemplary record in the field of orthoptics which is recognised by the IOA Council of Management

- b. the applicant does not otherwise meet criteria for membership of the IOA
 - c. the applicant works in a country which has no recognised process for education, training or registration in orthoptics
- 2) The following conditions apply to affiliates:
- a. no seat on the Council of Management
 - b. no voting privileges at the AGM
 - c. a subscription rate for a period of four (4) years to be stipulated by the Council of Management
- 3) Benefits of affiliation include:
- a. eligibility to attend IOA Congress at a reduced registration fee
 - b. eligibility to present at IOA Congress
 - c. to receive a copy of the IOA Transactions
 - d. access to the members only section of the IOA website
- 4) Termination of membership: [COM approved, March 2014]
- a. Affiliate Members may terminate membership at any time but must do the following:
 - 1. Provide a written notice of resignation to the IOA President and Secretary before October 31st of the year of resignation.
 - 2. Pay subscription fee for the following year if notice of resignation is received after October 31st.
 - b. The IOA Council of Management reserves the right to review and terminate membership based on any of the following:
 - 1. The IOA Council of Management or IOA officers receive a complaint or evidence is uncovered that an Affiliate Member brings disrepute and/or produces harm to the orthoptic profession.
 - 2. An Affiliate Member fails to maintain the terms of reference for their membership.
 - 3. An Affiliate Member has not paid subscriptions by year end following every reasonable attempt at contact by the IOA officers.
 - c. The voting members of the Council of Management will decide if termination of membership is necessary.
- 5) The decision of the Council of Management regarding acceptance of affiliates is final and reviewed at four (4) yearly intervals.
- 6) Appeal Process for Termination of Membership [Min (C) 2015; 11D3]: A member may seek to appeal the IOA Council of Management's (COM) decision to terminate their membership.
- a. They must appeal the termination in writing within thirty (30) calendar days of receipt of the notice of termination.

1. The appeal must be sent to both the IOA President and the IOA Secretary.
 2. The appeal will include the specific reason(s) it is believed that the termination is unwarranted.
- b. Upon receipt of the appeal, the President will immediately notify the COM of the appeal.
1. Within thirty (30) days of making the appeal, the COM will discuss the termination in person or online and make a determination based on the appeal and evidence presented that resulted in the appeal.
 2. The terminated member has the burden of demonstrating why the termination was unwarranted.
 3. At the discretion of the COM, the COM and/or the terminated member may ask other relevant parties to respond to questions or provide additional information.
- c. The IOA President will inform the appellant of the COM's decision in writing. The decision of the COM is final.

36. IOA Collaborations and Memberships

A. IPOSC

The IOA is a supranational member of the International Pediatric Ophthalmology and Strabismus Council (IPOSC).

B. ICO

By virtue of IPOSC membership, the IOA attained membership with the International Council of Ophthalmology (ICO).

C. WSPOS

The IOA holds membership in the World Society of Pediatric Ophthalmology and Strabismus (WSPOS) and sits on its Global Advisory Council.

D. ISA

The IOA signed a memorandum of understanding with the International Strabismological Association (ISA) which outlines the framework for cooperation between the two organizations. See Appendix H for terms of this agreement.



INTERNATIONAL
ORTHOPTIC
ASSOCIATION

SCIENTIFIC CONGRESS

(Sections 37-40)

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37. The International Orthoptic Congress (General Principles)

- A.** The most important event in the calendar of the Association is the Scientific Congress which is held once every four (4) years.

- B.** It has been the custom for the Council to invite applications from National Associations for permission to stage the forthcoming Congress. It is desirable that such applications be lodged at least four (4) years (though preferably longer) prior to the proposed date for the next Congress, so that the Council can select the successful applicant Association, and formally announce the venue at the close of the proceedings of the current Congress. The country chosen to host an International Congress should not be the country of the President of the IOA. [Min (C) 1983; 9b (iv)]
 - 1) The IOA representative must make available to the National Association the Guidelines, (see Section 38) and the Contract (Appendix F) before a formal request to host the Congress is submitted to the IOA Council of Management.
 - 2) A National Association requesting to host the Congress must agree to the terms of the Guidelines and the Contract.

- C.** The Council shall advise the successful National Association and invite it to nominate from amongst its members the personnel comprising the Chairman and members of the Organising Committee. The names of those nominated shall be forwarded to the President and Secretary of the IOA.

- D.** The Council has the responsibility for the conduct of the Congress and all recommendations and programmes formulated by the specifically appointed committees must be confirmed by the Council. In particular, the Council reserves the right to recommend alterations to the proposals of the Congress Scientific Committee and/or the Organising Committee in matters relating to venue, programme, and financing of the Congress.
 - 1) An agreement (contract) confirming the conduct of the Congress must be signed by the IOA and the host country.
 - 2) A sample agreement (contract) is appended to this document. (Appendix F)
 - 3) Expenses incurred by members of the CSPC and COC, when attending meetings pertaining to the congress (i.e. travel and hotel expenses) shall be paid from IOC funds. In the event of such a meeting coinciding with a Council meeting and a Council member also being a member of one of the said committees, expenses not covered by the National Association will be met from IOC funds.

- E.** Guidelines for the operations of the Congress have been agreed upon. (See Section 38)
- F.** The two (2) specifically appointed committees responsible for the Congress arrangements are:
 - 1) the Congress Scientific Programme Committee (CSPC)
 - 2) the Congress Organising Committee (COC)
- G.** The Congress Scientific Programme Committee (appointed by the Council) is responsible for the Scientific Programme of the Congress, including the subject matter, selection of papers and invited speakers, publication of abstracts, the Transactions and translations. (For details refer to the Guidelines for the International Orthoptic Congress in Section 38).
- H.** The Congress Organising Committee (appointed by the National Association of the host country) is responsible for all other matters in connection with the conduct of the Congress, including finance, social functions, registration and the general administration. (For details refer to the Guidelines for the International Orthoptic Congress in Section 38).

38. Guidelines for the International Orthoptic Congress

A. General Information

For general principles see IOA Handbook, Section 37.

- 1) The International Orthoptic Association sponsors a Congress once every four (4) years. The Congress bears the name of the Association and is financed by the Association. The name of the Congress is the International Orthoptic Congress. The Association retains full authority over its organisation, the scientific programme, and all fiscal matters.
- 2) The host country works on behalf of the Association and is accountable to the Association's Council of Management for all expenditures and for the organisation and the programmes of the Congress.
- 3) The planning and implementation of the Congress is vested in two (2) committees:

The Congress Organising Committee (COC)

The Congress Scientific Programme Committee (CSPC)

Both Committees work as agents of the Association and are responsible for the planning and implementation of the Congress. They must submit reports and minutes to the Association typed and in English.

- 4) A contract between the Congress Organising Committee of the host National Association and the IOA will be agreed. This contract will

stipulate the terms of the financial agreement and the conditions of the loan made to the Committee by the International Orthoptic Association. This agreement is legal and binding and must be understood before it is signed, as it makes the Organising Committee accountable to the Council of Management for all aspects of the Congress's organisation.

B. Finances

- 1) The International Orthoptic Association will lend to the Congress Organising Committee an agreed sum in sterling to cover the initial costs of the Congress, once the Committee has signed the Contract agreeing to the terms of the loan. The Contract gives the Council final responsibility and total authority for the Congress and places the Committee in the role of agent for the Association and accountable to the Council of Management.
- 2) It is recommended that the Congress budget be calculated with a breakeven of 300-350 delegates when the Congress is held outside of Europe and 450 – 500 when held in Europe. These figures may be increased if the number of orthoptists expected to attend from the host country exceeds 500.
- 3) **The Congress Organising Committee** has the following financial responsibilities in planning and implementing the Congress:
 - a. to submit to the IOA President to establish an official financial budget for approval by Council, on the basis that each Congress must be financially self-supporting and should provide funding for the next Congress. Estimates and draft budgets must be submitted to Council, which may agree through its President on items of major expenditure and, where necessary, give authority for additional loans
 - b. to submit to the IOA President and Officers of the Association a six (6) monthly expenditure account and a detailed projected quarterly budget in English. Copies of all budgets, together with an annual report, in English, must be sent to the IOA President and Officers of the Association prior to each Council meeting
 - c. to submit a copy of the budget and expenditure account to all members of the Finance committee prior to each council meeting
 - d. to send a final report and balance sheet, with proper accounting of credits, to the IOA President and Officers of the Association no later than six (6) months after the conclusion of the Congress
- 4) The IOA President's expenses for attending the Scientific and Organising Committee meetings are to be paid out of IOA funds
- 5) **Expenses** incurred by the Chairmen and Members of the Congress Organising Committee and the Congress Scientific Programme Committee are to be met from Congress funds as dictated by the

Congress budget. The Congress Organising Committee is encouraged to carry out teleconference meetings where possible to minimize the number of face-to-face meetings required. The Congress Scientific Programme Committee is encouraged to perform their work mainly via e-mail correspondence and carry out video or teleconference meetings to avoid traveling expenses. Expenses such as these listed will be paid:

- a. budget and petty cash in advance for the Chairman of the Congress Scientific Programme Committee
 - b. stationery, postage, telephone calls, secretarial assistance, travel expenses to committee meetings, including accommodation and meals, and insurance against all possible assumable risks
- 6) It is necessary to provide the Congress Scientific Programme Committee with accommodation in a hotel of appropriate standard as close as possible to the Congress venue during the Congress and in the days immediately pre and post-Congress.

During the Congress, the following expenses are to be met from the Congress funds:

- a. the Congress registration fee (including evening social events) for all members of the two (2) committees (COC, CSPC) shall be waived
- b. consideration should be given to complimentary attendance at social functions for IOA Officers
- c. the Organising Committee is asked to consider that ideally the IOA President-elect and the Council of Management should be accommodated in the same hotel as the IOA Officers and members of the two (2) Committees

C. Congress Venue

- 1) The policy of the IOA is that the Congress will be held on rotation in countries where there is a National Orthoptic Association. The host country must not be that of the IOA President.
- 2) Applications to host the Congress will be sought by the Council of Management, and should be filed at least six (6) years prior to the projected date of the Congress, or earlier where possible, in order that the venue is known at least four (4) years in advance.
- 3) The host country must provide a suitable venue with international standard congress facilities. A purpose-built centre is necessary and must include speaker's rooms, committee rooms, offices, registration and exhibition areas, cloakrooms, refreshment facilities, telephone systems, duplicating equipment, simultaneous translation facilities and up-to-date audio-visual facilities both inside and outside the main auditorium.

D. Role of the IOA

- 1) The IOA will bear the financial responsibility for the Congress under the terms of the Contract agreed between the IOA and the Congress Organising Committee. The Council has the final responsibility for the Congress's organisation, and reserves the right to alter proposals of the Congress Scientific Programme Committee and the Congress Organising Committee relating to the programme, venue and finances.
- 2) The advice of the IOA lawyers and the advice of lawyers from the host country will be sought to clarify any questions regarding the contract and legal liability, in relation to the National Association of the host country.
- 3) Following the Council meeting at which the Congress venue is decided, the Secretary will send to the Organising Committee Chairman, a copy of the Guidelines and if necessary, a copy of the Transactions of a previous Congress for the translators. The Congress file from the previous Congress together with recommendations must be sent to the new Organising Committee no later than six (6) months after the end of each Congress.
- 4) The IOA President must be responsible for handing over the files to the CSPC and the COC Chairmen.

E. Payment to Organising Associations

If a Congress makes a profit, 20% of this profit will be paid to the Host Organisation. This sum is 20% of any profit made once all outstanding expenses have been met. This applies to all congresses from 2012. The IOA reserves the right to withhold this sum under exceptional circumstances.

F. The Congress Committees

General Information

1) Role of the Committees

- a. Acting on behalf of Council, the Congress Organising Committee and the Congress Scientific Programme Committee are responsible for planning and directing the Congress.
- b. Liaison between the two (2) Committees is essential, and the Organising Committee must cooperate to provide any facilities requested by the Programme Committee.
- c. Agendas and minutes of the meetings of the two (2) Committees must be exchanged by the Chairmen, with copies to the IOA President.

- d. Copies of all important, decisive correspondence and reports between the two (2) Committees are to be sent to the IOA President.
- e. Items for the Congress Website must be passed by the President before publication.
- f. When either Committee Chairman is not a Council member, he/she is to be invited to attend the relevant part of the Council meeting, or to delegate a Committee member to attend in her stead. Travel expenses, hotel accommodation and meals not usually covered by the National Association, will be met from Congress funds.
- g. It is anticipated that the Congress Organising Committee Chair and Congress Scientific Committee Chair will maintain regular communication so both committees are informed of the Congress plans and needs of each other.

2) **Committee Reports**

- a. Progress reports must be sent from Committee Chairmen to the IOA President and Officers of the Association, and to the Chairman of the other Congress Committee.
- b. The final balance sheet is to be made available no later than six (6) months after the Congress. The COC final report will include a summary of Congress proceedings, evaluations and recommendations for future meetings. The CSPC final report will follow submission of Congress papers in a medline (supplement) journal.
- c. Changes, proposals, recommendations and amendments of the two (2) Committees should be submitted to the CM and if voted on should go into the Guidelines for the International Orthoptic Congress.

3) **Role of the IOA President**

- a. The President is an ex officio member of both Committees, and must therefore receive a copy of all Committee reports and minutes.
- b. The President has a deciding vote between the two (2) Committees and veto power for both Committees for items returned to Council.

G. The Congress Organising Committee (COC)

- 1) This Committee, on behalf of the IOA Council, is responsible for matters in connection with planning and implementing the Congress in the areas of finance, social functions and general administration. It has the responsibility to announce and to advertise the Congress, but must confirm the advertisement with the Programme Committee Chairman prior to circulation.

2) Committee Requirements:

- a. at least one member of the committee, preferably the Chairman, is to have recent experience in organising a National or International conference, and must have attended at least one IOA Congress
- b. the Committee Treasurer should have experience in developing a budget, maintaining financial records, and providing financial advice.
- c. the Treasurer's final report will be presented to Council. Council reserves the right to request an audited report if any irregularities are noted.

3) The Committee's Duties:

- a. to select a suitable Congress venue
- b. to appoint management organisers with the necessary expertise
- c. liaise with Congress Scientific Programme Committee via the Committee Chairs
- d. to be responsible for all pre-Congress publicity, including the preparation and distribution of notices, leaflets (flyers), notices in ophthalmic and orthoptic journals, design and printing of stationery bearing the IOA logo, design and distribution of Congress posters, and all other relevant publicity material
- e. to prepare a leaflet/website that will provide information regarding the scientific and social programmes for delegates and make the first call for papers. This and the mailing list shall be done in liaison with the Programme Committee. It is recommended that this list includes all AAPOS-ISA-ESA-WCPOS and CLADE members
- f. it is recommended that this preliminary information and call for papers be publicised two (2) years ahead of the Congress and repeated fourteen (14) months before the Congress
- g. to take responsibility for staging the Congress, including the organisation of:
 - 1. trade exhibition, including posters and other advertising material
 - 2. press coverage, including a photographer for the opening and closing ceremonies
 - 3. a photographer for the Burian Lecture
 - 4. all social functions, and the opening and closing ceremonies in liaison with the Programme Committee
 - 5. travel and accommodation, including when possible the appointment of an official airline carrier and official pre- and post-Congress tours that will include accompanying persons
 - 6. processing applications and registering delegates
 - 7. helpers, providing bilingual translations if required, English and the host country's language

8. financial and business aspects of publishing the transactions, printing the programme, abstracts and transactions
9. The CSPC will convey to the COC the requirements for abstract and paper submissions that will be listed on the Congress website
10. programming lunch and coffee breaks in conjunction with the Programme Committee
11. The COC will consult with the CSPC about the requirements for their audio-visual needs
12. Registration fees should follow Council's Congress pricing guidelines
13. waiving the registration fee of the International Orthoptic Association Research Awardee
14. waiving the Burian Lecturer's registration fee for the Congress
15. waiving the Congress registration fee for the recipient of the Education Grant
16. to seek sponsorship for the Congress
17. to liaise with the Public Relations committee regarding the IOA Corner
18. to provide a simultaneous translation service, if necessary, including engaging a firm, drawing up and executing a contract regarding hours of work and payment of fees
19. to liaise with the Education Forum regarding the venue of their meeting

4) Recommendations to the Committee:

- a. make a calendar that includes the first announcement and journal advertisements, at least three (3) years in advance
- b. make a checklist of duties for succeeding committees
- c. The COC should be provided with the contact information for prior Congress exhibitors/sponsors
- d. the use of a Professional Congress Organiser is recommended

5) Committee Functions:

- a. all Committee decisions must be made by a democratic vote. Major decisions cannot be made by an "executive body" without a vote of the entire Committee. The quorum of the Committee is not less than half the total membership
- b. the Committee has the power to appoint subcommittees of its members and to delegate to the subcommittees such of its powers and responsibilities that it considers advisable
- c. the meetings of the Committee will be held at such times and places as determined by the Committee Chairman, with notice of at least twenty four (24) hours given to member
- d. the Committee has the responsibility to provide the Council with an annual, up-to-date report of its activities. Copies of agenda and

minutes of all meetings are to be sent to the IOA President and to the Chairman of the Programme Committee

6) Guidelines for Registration Fees

- a. It is suggested that registration fees should be calculated with the assistance of the PCO and agreed upon by the Finance Committee before publication on the Association's Congress Website. The following instructions should be adhered to wherever possible:
 1. The registration fee for orthoptists, both IOA members and non-members must be lower than the fee for ophthalmologists
 2. Associate member ophthalmologist fees must be lower than the fee for non-member ophthalmologists
 3. Delegate fees should where possible include all coffee breaks, lunches, get together social event, abstract/programme book, transactions, access to the Trade Exhibition and plenary sessions
 4. It is suggested that accompanying persons registration fee include get together social event and tourist information
 5. The Education Forum is a subsection of the Congress and registration fees should cover the cost.
 6. Additional registration categories may be added to the registration form following discussion with the CSPC and the IOA President
- b. The following categories must always be included:
 1. Orthoptist IOA member
 2. Orthoptist non-member
 3. Ophthalmologist associate member
 4. Ophthalmologist non-member
 5. Students
 6. Residents/fellows
 7. Others
- c. At the discretion of the COC:
Accompanying persons
- d. Types of registration
 1. Early bird
 2. Late
 3. Onsite
 4. Day
- e. Additional items for registration form
Other social events not included in the registration fee, e.g.,
Congress dinner, excursion

H. The Congress Scientific Programme Committee (CSPC)

- 1) On behalf of Council, this Committee is responsible for the Scientific Programme of the Congress.
- 2) This committee is also responsible for the selection of papers, invitations to speakers, and preparation of abstracts and the transactions for publication. The Chairman of the Committee is responsible for collecting papers to be published and for decisions regarding format, type of cover, and printing method to be used.
- 3) In organising the Scientific Programme, the Committee will decide the format, which may change from one Congress to another, select an overall theme, specific topics if desired, and decide the papers to be included in the programme by a grading system.
- 4) **Committee Requirements:**
 - a. Council elects the Chairman at the Council meeting in the year following the Congress. The Council may invite nominations from National Association and other members of the Association.
 - b. nominations must be accompanied by a letter of recommendation from the National Association; a curriculum vitae is required
 - c. the Committee is to have five (5) full members. The IOA President is an ex officio member of the Committee
 - d. one (1) elected member must be an experienced CSPC member
 - e. one (1) member must come from the host country; they will be nominated by the host association and ratified by the Scientific Committee
 - f. Two (2) additional elected members will serve on this committee (international representation is desirable)
 - g. it is recommended that members should not serve more than two (2) consecutive terms
 - h. a Committee quorum is to be three (3) [CM Salzburg, 24.-25.05.1989]
- 5) **The Committee's Duties:**
 - a. liaise with the Congress Organising Committee via the Committee Chairs
 - b. to prepare the forms for submission of abstracts, papers, video presentations, workshops and posters
 - c. to instruct speakers concerning their presentations, briefing arrangements, slide projection requirements, facilities, length and deadline for abstracts for publication, and transaction requirements
 - d. to instruct poster, video and Power Point exhibitors concerning their presentations, including format to be used, time schedules,

mounting, audio-visual facilities, and deadline for receipt of material for publication

- e. to arrange programme timing with the Organising Committee, i.e. commencement and end of sessions, including workshops and a poster discussion session
- f. to allow time on the Congress programme for a suitable introduction and presentation by the Chairman of the CSPC of a certificate of merit to the International Orthoptic Association Research Awardee
- g. to allow time on the Congress programme for a suitable introduction and presentation by the IOA President of a certificate of merit to the Burian lecturer
- h. to select Chairmen and Moderators for each session, with an emphasis on orthoptic representation
- i. to circulate papers to Moderators and Translators
- j. to brief Speakers, Chairmen and Moderators prior to the session
- k. to collect papers for publication
- l. to maintain liaison with the Organising Committee to provide a list of participants in the Scientific Programme and other details for publication of the programme
- m. to thank in writing all participants in the Scientific Programme
- n. to decide on the content and format of the Transactions, to be published in English
- o. to compile in liaison with the organising committee the Final Programme booklet

6) Recommendations to the Committee:

- a. produce a calendar at least three (3) years before the Congress that will include the date for the call of papers, posters and videos. To this should be added deadline dates for distributing flyers, printing and mailing the provisional and final programme, and the deadline for receipt of papers for publication in the transactions
- b. when creating a skeleton programme, work closely with the Organising Committee so that, if possible, sessions end earlier on days with evening social functions
- c. include in the Provisional Programme the names of all speakers whose papers have been accepted
- d. it should be made very clear to any “invited” participants (Chairmen, Moderators, Panel members, Workshop participants) that they must register for the meeting at the regular fee
- e. presenters, who are orthoptists should be designated as such in the programme
- f. produce a checklist of duties for succeeding committees

- g. allow discussion time after each session
- h. consider including a panel discussion with invited panellists
- i. make the necessary arrangements for any planned poster presentations
- j. maintain close communication with the Organising Committee

7) Committee Functions:

- a. the Committee has the power to appoint a sub-committee and to delegate to it such of its powers and responsibilities that it considers advisable
- b. the Committee Chairman determines the date and place of the Committee's meetings. Copies of notices, agenda and minutes are to be sent to the IOA President and to the Organising Committee Chairman. Meetings are usually arranged to coincide with a National orthoptic meeting or an Organising Committee meeting
- c. the Committee maintains liaison with Council via the President and Secretary over dates and times of Committee meetings. This is essential to allow adequate time for integrating of Committee meetings with Council meetings

I. General Remarks

1) International Relations

An informal get together party for delegates from non IOA member countries could be considered if possible at IOA Congresses. Valuable contacts can be made in this way and one of the IOA's aims will be fulfilled. Sponsorship should be sought to continue this arrangement.

2) IOA Corner

The IOA corner, part of the industrial exhibition, should always be a part of IOA congresses, and should be organised by the PR committee.

3) Zoran Georgievski Education Forum

This half day meeting is a formal session of the Congress and organised by the IOA Education and Research Program in conjunction with host country program reps or country reps where no program exists

4) Professional Congress Organiser

When using a Professional Congress Organiser the COC will negotiate a fair and reasonable contract that details all services and their costs to be provided along with a list of what would be considered subject to any additional charges.

5) Policy regarding economic assistance in conjunction with IOA Congresses

- a. All queries regarding economic assistance, i.e. reduced registration fees, reduced exhibition fees, personal invitations, etc., in

conjunction with IOA congresses should be referred to the IOA President.

- b. Each case will be judged on its merit and a joint decision taken following discussion between the PCO, Chairman of the COC and the IOA President.
- c. Background information should be collected where necessary,
- d. Where possible assistance and advice will be offered (non-economic).
- e. In principal the majority of this type of demand will not be honoured.

J. The Congress Format

1) The Burian Lecture (for further details, see also Section 41)

- a. The Burian Lecture was instituted in 1975 to commemorate Hermann Burian for his contribution to strabismology and his support of orthoptics. It is the highlight of each Congress.
- b. The Lecture must be scientific in content.
- c. The Lecture must be given at each Congress by an orthoptist.
- d. The orthoptist who is elected to be the Burian Lecturer must be a member of the IOA.
- e. Any IOA member is entitled to nominate an orthoptist to deliver the Lecture.

2) Guest Symposia (for further details, see also Section 39)

It is for the CSPC to decide which organisations should run guest symposia at IOA Congresses but consideration should always be given to having the International Strabismological Association (ISA).

3) The IOA Research Award (For further details see also Section 42)

- a. The IOA Research Award was instituted in 1991. It is presented at every IOA Congress for the most outstanding research paper and presentation given by an orthoptist.
- b. The objective of this award is to promote the science of orthoptics internationally by furthering the study of orthoptics and its associated disciplines.

4) The IOA Education Grant (For further details see also Section 43)

The IOA Education Grant was instituted in 2003 to give financial help to one orthoptist qualified in a non-IOA country to attend an International Orthoptic Congress relating to the International Orthoptic Association Exchange Programme.

5) The IOA Student Research Award (For further details see Section 44)

The IOA Student Research Award was instituted in 2015 to promote and recognize students who engage in research. This award is given every four years at the IOA Congress.

6) **The IOA Stephenson Honorary Fellow Award** (For further details see Section 45)

- a. The IOA Stephenson Honorary Fellow Award was instituted in 2015 in memory of Professor Gail Stephenson, former IOA Deputy President and Council member. Professor Stephenson devoted many hours of service of orthoptics nationally and internationally. She achieved great distinction for her commitment to orthoptic education and the development of the profession.
- b. This award recognizes orthoptists' outstanding contributions and distinguished service to the profession of orthoptics at the local and international level.
- c. It is an award of high order and will be rarely conferred.
- d. The awardee must be an IOA member.

7) **The IOA Early Career Clinician-Scientist Research Award** (For further details see Section 46)

- a. The IOA Early Career Clinician-Scientist Research Award was instituted in 2015 to recognize recent orthoptic graduate researchers who are engaged in basic or clinical research and are committed to careers as orthoptic clinician-scientists.
- b. The awards are presented every four (4) years in recognition of significant research work by a new researcher at the IOA Congress or other suitable IOA event.
- c. The awardee must be an IOA member.

8) **The Zoran Georgievski Education Forum** (For further details see also Section 40)

- a. The inaugural IOA Education Forum was an adjunct meeting at the 2004 IOA Congress in Melbourne, Australia. The forum was incorporated into the Congress in 2012.
- b. The Education Forum is a meeting organized for orthoptists and others who work primarily with or who have a special interest in the education and training of orthoptic students.
- c. The Education Forum was renamed The Zoran Georgievski Orthoptic Education Forum in 2015 in memory of Mr. Zoran Georgievski, former IOA Deputy President and Council member, who founded the Education Forum.

9) **The Transactions**

- a. Transactions may be in a digital or electronic format (to be decided by the COM on recommendation from the CSPC for each individual Congress).

- b. The format and the content, including posters, are the responsibility of the Programme Committee. Details are to be given to the Organising Committee, which is responsible for the business side of the Congress and the publications.
- c. For the Transactions, the authors should be asked not to put page numbers on the original manuscript. Tables, figures and photos should be placed within the manuscript near their point of reference. They should not be added at the end of the manuscript as extra pages.
- d. Again, very specific format instructions are necessary for the camera-ready manuscript.
- e. The printing should be done in the Congress' host country, and the Chairmen of the two (2) Congress Committees share joint responsibility for publication.
- f. Liaison between the two (2) Congress Committees is essential.
- g. Indexing of the Transactions must be investigated in conjunction with the appointed publisher.
- h. The Transactions should, if possible, be published so that they are available for distribution at the end of the Congress.
- i. Copies are to be held for distribution to all partner countries, to all individual orthoptist members, to all ophthalmologist members, and all affiliate members who are not able to attend the IOA Congress.
- j. The cover is to be of semi-hardback style.
- k. The Transactions must list the following:
 1. copyright date
 2. publication date
 3. publisher's name
 4. ISBN number
 5. the members of the CSPC and of the Organising Committee

10) Abstracts

- a. The Chairman of the Congress Scientific Programme Committee will receive abstracts, record the names, medical centre affiliations and number of papers from each centre.
- b. Instructions for abstract submissions should be exceedingly clear and explicit. To avoid extra communications with authors and to minimize the amount of work in preparing the final programme and abstract book, be sure that:
 1. The abstracts will be submitted camera-ready for the final programme. Make sure that the format is uniform and that no portion is handwritten
 2. correspondence addresses and fax/phone numbers are typed and include the country code

3. presenting author is indicated
 4. that all programme participants will be required to register for the meeting
- c. If selection of abstracts will be masked, have the authors submit three (3) masked copies of their abstract along with the original and one (1) unmasked copy.
 - d. If anonymous selection is preferred, the names will be removed and a copy of each abstract will be sent to each Committee member.
 - e. Each Committee member will review and grade each abstract before returning it to the Committee Chairman.
 - f. The Committee may recommend a change in the format of the presentation.

11) **Technical Equipment**

- a. All appropriate technical equipment will be considered.
- b. The technical equipment to be used at the Congress should be stated on the preliminary notice.

12) **Posters**

Poster abstracts or an extended abstract shall be published in the Transactions.

13) **Simultaneous Translation**

- a. English is the official language of the Congress. There may be simultaneous translation into the language of the host country if there are five hundred (500) or more registrants from the host country, otherwise the cost will be borne by the venue country.
- b. Consideration should be given to the inclusion of Japanese translation.
- c. Any country with a smaller association membership may ask for a review of the above policy.

39. Guidelines for Congress Invited Symposia

A. History of symposia at the IOA Congress:

- 1) The first invited symposium presented by another organization at an IOA Congress was held in 1999 in Stockholm, Sweden.
- 2) An ISA symposium has been invited and presented at each Congress since 1999.
 - a. 1999 "Role of Binocularity": EC Campos and G Kommerell
 - b. 2004 "Update on the Pharmacological Treatment of Strabismus": J Lee (Chair), A Scott, J Lee, S Christiansen
 - c. 2008 "The Most Difficult Strabismus Cases I have been Asked to Treat": DT Sprunger, J Lee, E Helveston, JT DeFaber, C Timms

- d. 2012 “Eye Movement Disorders: Clinical and Surgical Aspects”: S Kraft (Chair), K Arnoldi, N Matta, R LaRoche
- 3) ISA has reciprocated by inviting the IOA to present a symposium at their meetings since 2002.
- a. 2002 “Vision Screening”: Kathleen Lantau, Liane Wilcox, Sarah Richardson, Gun Kvarnstrom
 - b. 2006 “The Role of the Orthoptist”: Daisy Godts, Leslie France, Louise Garnham, Cindy Pritchard
 - c. 2010 “Vision Screening Strategies Around the Globe”: Leah Walsh, Jan Roelof Polling, Anna O’Connor, Noelle Matta
 - d. 2014 “Ophthalmic Prisms from Diagnosis to Therapy”: Gail Stephenson (moderator), Daisy Godts, Helen Davis, Birgit Wahl, A Wakayama
- B.** The CSPC shall extend an invitation to the ISA to present a symposium at each Congress.
- 1) The invitation shall be extended to a minimum of two (2) years prior to the Congress.
 - 2) The topic of the symposium shall be selected by the CSPC and the ISA Program Committee Chair or his/her representative.
 - 3) The Chair of the Symposium shall be selected by the ISA Program Committee, with optional input from the CSPC.
 - a. It is encouraged that the symposium speakers include a mix of orthoptist and ophthalmologist presenters of the ISA.
 - b. Presenters are encouraged to submit abstracts for inclusion in the Congress Program book.
 - 4) The symposium shall be no more than sixty (60) minutes.
 - 5) The CSPC shall invite the symposium chair and speakers to submit their manuscripts to the Transactions of the Congress.
- C.** The CSPC may invite additional organizations to present symposia based on the following guidelines:
- 1) The number of invited symposia at any Congress be limited to three (3), including the ISA symposium.
 - 2) Only “supranational” organizations may be invited.
 - 3) Only organizations willing to reciprocate by inviting the IOA to present a symposium at their scientific meetings (if applicable) may be invited.
 - 4) The invitation should be extended to a minimum of two (2) years prior to the Congress.
 - 5) Organizations are encouraged to include a mix of orthoptist and non-orthoptist speakers.

- 6) Presenters are encouraged to submit abstracts for inclusion in the Congress Program book.
- 7) The symposium shall be no more than sixty (60) minutes.
- 8) The symposium presenters shall be invited to submit their presentations to the Transactions of the Congress.

40. The Zoran Georgievski Education Forum

[Min (C) 2013; 26 A-C]

A. History of the Education Forum:

- 1) The Inaugural IOA Education Forum was an adjunct meeting at the 2004 IOA Congress in Melbourne, Australia. The forum was incorporated into the Congress in 2012.
- 2) The Education Forum is a meeting organized for orthoptists and others who work primarily with or who have a special interest in the education and training of orthoptic students.
- 3) The Education Forum was renamed The Zoran Georgievski Orthoptic Education Forum in 2015 in memory of Mr. Zoran Georgievski, former IOA Deputy President and Council member, who founded the Education Forum [Min (C) 2015; 23D].

B. Education Forum Organizing Committee: A committee to organize the education forum is to be developed for each Congress. The committee should include:

- 1) Two representatives from the Education Network
- 2) Up to two representatives from the host country orthoptic training school(s) or two representatives from the host country where no training school is available.

C. Responsibilities of the Education Forum Organizing Committee:

- 1) Liaise with the chairman of the COC in all questions relating to timing, locality, AV requirements, etc. of the forum.
- 2) Liaise with the chairman of the Scientific Committee regarding education forum abstracts.
- 3) Discuss registration procedure for the Forum with the COC and PCO.
- 4) Advertise the Forum via IOA Social Media.
- 5) Coordinate and oversee the program.
- 6) Present a short report of the proceedings at the Annual General Meeting held during the Congress.

- 7) Present a written report to the webmaster for publication on the website.

D. Education Forum Guidelines:

- 1) Should be open to any delegate involved or interested in teaching.
- 2) Should generally be scheduled prior to the scientific congress but can be organized during or after the congress.
- 3) Two components of the forum:
 - a. A themed section with invited speakers
 - b. A free papers section: A call for education papers is to be made with the general call for congress abstracts.
- 4) An additional fee should be determined for the education forum as the registration fee is developed.
- 5) The forum should be advertised on IOA Social Media and information distributed via national associations.



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IOA RECOGNITIONS

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41. Burian Lecture

- A.** The Burian Lecture was instituted in 1975 to commemorate Hermann Burian for his contribution to strabismology and his support of orthoptics. It is the highlight of each Congress.
- B.** The Burian Lecture will be provided by a distinguished IOA Orthoptist who is being honoured for their lifetime scientific and evidence-based clinical contributions to orthoptics and vision science.
- C.** The Burian Lecturer should possess a proven body of expertise that is recognized worldwide.
- D.** No one individual may receive the award more than once.
- E.** Any IOA member is entitled to nominate an Orthoptist to deliver the Lecture.
- F.** The IOA Scientific Committee and The Congress Scientific Programme Committee will decide on the Burian Lecturer by secret ballot. The nomination process consists of submitting a nominating letter, the CV of the nominee, and at least two supporting letters. Up to three letters of support may be submitted (total number does not include the nomination letter). Nomination and supporting letters must clearly articulate how the candidate's research over a sustained period of time has made significant impact on the field. The letters must explain the contributions and their importance so that they can be understood by their peers and those outside the nominee's specific work/research area.
- G.** The first paragraph of each nomination and supporting letter should include the name of the candidate and a few sentences giving the overall reasons for nominating or supporting the candidate. The body of the nominating letter, which could be a few paragraphs, should give a brief and concise history of the candidate's work and any publications and/or outcomes that have resulted. Both the nomination and supporting letters should state how the work has contributed to the field overall and/or to the growth of the field, as well as insights that have been gained and what impacts the work will have on current and future work.
- H.** The last paragraph of the nomination and supporting letters should summarize the work, state who has benefitted, and highlight some of the candidate's recognitions and notable service to his/her field.
- I.** There will be a call for nominations three (3) years prior to the Congress at which the Burian Lecture is to be delivered.

- J.** The IOA President will notify the Lecturer and the nominator as soon as the decision has been made.
- K.** The Congress registration fee and the costs of the Congress dinner shall be waived for the orthoptist chosen to present the Burian Lecture.
- L.** The IOA shall provide accommodation for the Burian lecturer for the duration of the Congress.
- M.** The Burian Lecture shall be publicized in the final transactions of each IOA scientific congress.

42. IOA Research Award

D. Objective

To promote the science of Orthoptics internationally by furthering the study of orthoptics and its associated disciplines.

E. Prerequisites

- 1) The Awardee must be an orthoptist and a Full, Associate or Individual member of the IOA.
- 2) The Awardee must be the presenter and principal investigator of the research presented.

F. Role of the CSPC and SC

- 1) The CSPC shall decide, from papers accepted for presentation, which are eligible for the award.
- 2) The three (3) best papers selected by vote of the CSPC will be forwarded to the IOA President and each member of the Scientific Committee (SC).
- 3) The CSPC will inform Council of their choice (title and author's name).
- 4) In case of a tie, the Chairman of the CSPC will have the casting vote.

G. Criteria for judging

The criteria for judging will be as follows:

- 1) Both the oral presentation and written paper will be judged.
- 2) Judging will be conducted by the CSPC (5 members) and the SC (ad hoc) (4 members).
- 3) In the event of too few members or only an even number of members being present at the oral presentation the IOA President will be asked to take their place.

- 4) In case of a tie, the Chairman of the CSPC will have the casting vote.
- 5) In the event that on presentation, none of the selected papers is considered to be of an appropriate standard, no award will be made.

B. Paper presentation (20 points possible)

Scientific content, quality and validity of the research presented

- 1) Clarity with which the question is posed and matched with the methodology used 4 points
- 2) The originality and creativity of the research presented 4 points
- 3) The degree to which the contents of the paper could substantially contribute to the current state of knowledge and research in the field of orthoptics and/or its associated disciplines 4 points
- 4) The conclusions made are warranted on the basis of the research design and findings 4 points
- 5) Literature search, set up of experimental work, clarity of tables and graphs 4 points

C. Oral presentation (10 points possible)

- 1) Clarity of presentation (easy to hear and follow train of thought) 5 points
- 2) Use of AV material (power point, video etc.) 5 points

D. Award

- 1) The successful paper will be recognised by retrospectively waiving the registration fee for the current congress of the principal presenter only.
- 2) A certificate of merit will be presented to this orthoptist at the congress, directly prior to the closing ceremony.
- 3) The Award will be presented by the Chairman of the CSPC.

E. Publicity

- 1) The Award will be publicised in the call for papers for each IOA Scientific Congress as well as by IOA Council of Management members in each country.
- 2) The Awardee`s name will be added to the Honours Section of the IOA website.
- 3) The CSPC must allow time on the programme, prior to the closing ceremony, for a suitable introduction and presentation of a certificate of merit to the Awardee.

43. IOA Education Grant

- A. The IOA Education Grant was instituted in 2003 to give financial help to one (1) orthoptist from a non IOA country to attend an International Orthoptic Congress (relating to the International Orthoptic Association Exchange Programme).
- B. The Candidate must be from a non-IOA country.
- C. The Candidate must be sponsored by an IOA representative and association.
- D. Each representative can only submit one (1) candidate.
- E. The Candidate must have received some training from an IOA orthoptist and their clinical skills must have been observed by the orthoptist who recommended them.
- F. The Candidate must present a plan for ongoing orthoptic education.
- G. The Candidate must display a plan to share their knowledge with their colleagues.
- H. The Council of Management will decide on the awardee at the Council of Management meeting two (2) years prior to the Congress at which the award is to be given.
- I. The Recipient may be decided as early as three (3) years prior to the congress.
- J. This Award will not be given if no suitable applicant presents.
- K. The National Organisations should be informed.

44. IOA Student Research Award [Min (C) 2015; 23]

- A. The IOA Student Research Award was instituted in 2015 to promote and recognize students engaged in research. This award is given every four years at the IOA Congress.
- B. **Purpose:** This award is meant to stimulate student interest in research in orthoptic science and engage in evidence based practice. It is also meant to encourage students by participation in research to pursue a research career in orthoptic science.

- C. Eligibility:** Applicants must be registered at the time of application in a recognized orthoptic program (undergraduate or graduate) located in an IOA member or associate member country. To hold the award the applicant must have completed all the course requirements of at least the first year of orthoptic study (or two academic terms). Additionally, the applicant must have obtained, over the previous years of study, a cumulative average of at least second class (a grade of "B" or "B-," if applicable) as defined by their orthoptic program.
- D. Apply:** Candidates wishing to be considered will apply online and submit the following information:
- 1) A completed online application form.
 - 2) Submission of an abstract for the IOA Congress.
 - 3) Completed registration for the IOA Congress.
 - 4) Letter from Orthoptic Training Program Director confirming the applicant enrolment and year of study plus their good standing in that orthoptic program (defined as a cumulative average of at least second class grade of "B" or "B-" as determined by the program).
 - 5) Letter of support from Research Supervisor which outlines a clear description of the student's role in the research, the novelty of this work and the implications of this work.
- E. Selection:** Submissions will be reviewed by the IOA Congress Scientific Program Committee (CSPC) and selection for this award will be made by them. Selection will be based on both the submitted information and the actual presentation of the work by the student at the Congress. If a member of the CSPC is involved in the training of the applicant they will be required to depose themselves from the selection process.
- F. Award:** Free registration to the IOA Congress and a certificate that will be awarded at the Congress. Costs of this award will be covered by the IOA.
- G. Application date:** Deadline for applications is 6 months prior to Congress opening date.

45. IOA Stephenson Honorary Fellow Award [Min (C) 2015; 23]

- A.** The IOA Stephenson Honorary Fellow Award was instituted in 2015 in memory of Professor Gail Stephenson, former IOA Deputy President and Council member. Professor Stephenson devoted many hours of service of orthoptics nationally and internationally. She achieved great distinction for her commitment to orthoptic education and the development of the profession.

- B.** This category of recognition is for outstanding contributions and distinguished service to the profession of orthoptics at the local and international level.
- C.** The person nominated for this award must have made an exceptional impact to the profession within IOA member or associate member countries or developing countries the IOA is assisting. There must be evidence of excellence and outstanding performance over a number of years in various aspects of orthoptics e.g.:
- 1) Development and promotion of the profession
 - 2) Exceptional service in an elected position over and above what is expected
 - 3) Education of orthoptists
 - 4) Pioneering work in orthoptics
 - 5) Volunteer and humanitarian work
 - 6) Exceptional advocacy related efforts on the state, provincial, territory or national level for the profession
 - 7) Special service or specific effort for a cause that improves the quality of eye care
 - 8) Other evidence of awards
- D.** The award of Honorary Fellow is a cumulative award which will be submitted to stringent review by the IOA Council of Management. It is an award which is of high order and will be rarely conferred.
- E. Eligibility:** Candidate holds IOA membership. Consideration will be given to posthumous candidates.
- F. Application:** Nominations for this award can be made by any IOA member. Applications should include:
- 1) A completed online application
 - 2) A letter of support from the IOA member Country Association from which the candidate hails
 - 3) Two additional letters of support (e.g., from individuals with direct knowledge of the candidate's work, letters from organizations, etc.)
- G. Application deadline:** All applications must be received by the IOA President annually by February 1st.
- H. Selection:** The IOA Council of Management will review all applications and select the winner.

- I. **Award:** Certificate and pin to be presented at a prestigious function (i.e., Congress, AGM, etc.)

46. IOA Early Career Clinician-Scientist Research Award

[Min (C) 2015; 23]

- A. The IOA Early Career Clinician-Scientist Research Award was instituted in 2015 to recognize recent orthoptic graduate researchers who are engaged in basic clinical research and are committed to careers as orthoptic clinician-scientists.
- B. The Awards are presented every four (4) years in recognition of significant research work by a new researcher at the IOA Congress or other suitable event.
- C. **Purpose of the award:** to recognize individuals for conducting outstanding research early in their careers. The IOA recognizes that this award will contribute to the growth of the career of the awardee.
- D. **Eligibility:** Must have completed training or have shown other evidence of research career starting < 6 years prior to IOA Congress (i.e. research conducted within 5 years of doctoral and post-doctoral work, completed master's training or completed orthoptic training). Must be an IOA member.
- E. **Apply:** candidates wishing to be considered will apply online and submit the following information:
 - 1) A completed online application form.
 - 2) A research statement: The research statement should be 1,000 words maximum. Citations and references are allowed but not required. In-text citations do count towards the maximum word limit. Reference lists on a separate page will not count towards the word limit. This may be submitted as either a Word document or a PDF. APA format should be used and this statement should include:
 - a. Information on past research experience, including a section that highlights at least one project that has been completed recently (within 12 months preceding the date of application). Do not include figures or tables.
 - b. Information about current research and why it is important.
 - c. Future proposed research projects.
 - d. The research statement should be used to highlight independence of research, novelty of ideas and implications of research.
 - 3) A curriculum Vitae: This may be submitted as either a Word document or a PDF.

- 4) Two letters of recommendation: These letters should highlight the independence of the applicant's work and the significant contribution of this research, as well as the potential of this new researcher within their field of interest.
- F. Selection:** An ad hoc three member committee will be appointed by the IOA Education Research Program to review applications for this award and select the winner. Focus will be placed on the applicant's general research experience and specific completed research projects. The research independence of the applicant as well as the novelty and implications of research performed will be assessed.
- G. Application date:** Deadline for applications is 6 months prior to IOA Congress opening date.
- H. Award:** 400 Euros plus a certificate. IOA to be responsible for costs of this award and for seeking sponsorship.



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IOA POLICIES

(Sections 47-50)

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47. Policy: The IOA and Public Benefit

The Articles of Memorandum of the International Orthoptic Association (IOA) state the objectives of the Association. By meeting these objectives the Association fulfils the legal requirements and principles of Public Benefit imposed by the Charities Act 2006.

- A.** The objectives are:
- 1) to promote the science of orthoptics, the publication of related scientific material and an internationally accepted terminology for use by orthoptists and others involved in the field of strabismology
 - 2) to provide information and assistance to national authorities and individuals in order to initiate and develop the practice of orthoptics worldwide
 - 3) to promote high standards of orthoptic education and practice
 - 4) to organise international congresses for orthoptists and others concerned with the practice of orthoptics and the treatment of disorders of the binocular system and for the generation of knowledge of the science of orthoptics
- B.** The Association meets the above objectives by the work carried out throughout the year in the Committees and Networks of the Council of Management, (Executive board).
- C.** The Association does not impose any geographical or ethnic restriction on its members or beneficiaries.
- D.** Public benefit is achieved:
- 1) by increasing the awareness of the science of orthoptics and therefore eye health care
 - 2) by the dissemination of knowledge to members and others involved in the eye care of children and adults
 - 3) by offering a service to authorities and governmental bodies wishing to establish and/or improve eye health education and screening procedure
 - 4) by the exchange of knowledge and experience through the Partner Country, Exchange and Volunteer Programmes where eye care in the developing world is in focus
 - 5) by organising congresses that present a forum for discussion, stimulate research and encourage an exchange of knowledge, all of which benefit international eye care
 - 6) The Association will continue in its endeavours to uphold its objectives and increase its contribution to improved eye health care worldwide.

48. Policy: Participation in IOA Symposia at Other Meetings

- A.** The IOA are unable to pay air fares, hotels and all other expenses incurred by participants in IOA symposia (e.g. during ISA meetings).
- B.** Orthoptists taking part in IOA symposia that are not funded by their place of work or by other means may apply to the Treasurer of the IOA for their congress registration fee to be paid by the IOA.
- C.** Wherever possible orthoptists who are members of the IOA and who will be attending a meeting at which an IOA symposium is to be given, should be asked to take part in the Symposium.

49. Policy: Use of Members' E-mail Addresses and Membership Lists

The International Orthoptic Association (IOA) is mindful of its members' privacy and has therefore adopted the following policy regarding the use of members' email addresses and membership lists.

Lists of members' email addresses forwarded to the IOA by National Orthoptic Associations will only be used for the following purposes:

- A.** member identification for receipt of an individual password allowing access to the "members only section" of the IOA website
- B.** the dissemination of information regarding forthcoming International Orthoptic Congresses (max. twice yearly by COC Chair only)
- C.** in special circumstances, e.g. where legislative bodies require that each member receives information individually (permission must be granted by both the President and Secretary)

Members email addresses and membership lists will not be forwarded to other organisations, institutions, journals/periodicals or individuals.

Members' emails addresses and membership lists will be in the safe keeping of the IOA Webmaster who is bound by the above criteria and who has signed a document to that effect. (See Appendix G)

50. Policy: IOA Recognition of National Orthoptic Programs [Min (C) 2014; 6B]

The IOA recognizes national orthoptic programs based on the following requirements and criterion:

A. Requirement: The national orthoptic professional organization, including or in collaboration with regulatory bodies for the profession, has developed and approved a national entry competency profile/requirements for practice document. The national competency profile/requirements for practice document is used by educational programs as the framework for curriculum development and the development of didactic and clinical learning objectives.

Criterion:

- 1) The orthoptic program goals include reference to the orthoptic national competency profile for the profession.
 - Program goals can be multifaceted. They may reflect influences from the educational institution's vision, program expectations, government directives, professional association's directions, regulatory college's regulations, employer's needs, and others. All these influences contribute to program development and evolution.
- 2) The orthoptic program has competency based learning objectives that encompass all orthoptic competencies specified in the national competency profile.
 - The program develops competency-based objectives and implements learning activities to ensure that all competencies required for the profession are taught. The curriculum provides opportunities for students to acquire the knowledge, skills and behaviors specified in the national competency profile.
- 3) The orthoptic program should enable students to attain the competencies specified in the national competency profile for the profession.
 - The program plan for student learning facilitates student success in the attainment of competencies. The student's path from the beginning of the program to the end is clear and logical. The choices made regarding overall length of the program, delivery mode(s), sequence of courses and practicum delivery (clinical rotations) optimize student learning and attainment of competencies within the particular context, mandate and restrictions of the program.
- 4) Orthoptic practice placements must be integral to the program.

- a. The practice environment offers invaluable opportunity to apply and extend student knowledge developed in the program's studies and ensure professional competencies for entry to practice are attained. The process for orthoptic investigation and management includes orthoptic diagnostic testing, diagnosis, and orthoptic management. All students should be encouraged to interpret, analyse and use published evidence to support their clinical decisions. In addition, the orthoptist needs to be able to work as part of an interdisciplinary eye care team and uphold the codes associated with orthoptic professional practice. These inter and intra-disciplinary skills are best practiced in the real world setting of clinical practice.
- b. Learning experience in the practice environment is enhanced by opportunities for enquiry based learning, guided practice, observation and reflection guided by clinical educators. Clinical educators are senior, experienced orthoptists, who through their professional expertise, assist in student development and assessment of professional knowledge and skills.

B. Requirement: The program's resources are adequate to support student learning and attainment of orthoptic competencies.

Criterion:

- 1) Personnel with Relevant Qualifications: Program personnel have professional designations/qualifications that are directly related to the orthoptic discipline or subjects being taught. Assessors/preceptors during laboratory, clinical and practicum settings assess students only on competencies that are within their scope of practice (i.e. orthoptic clinical instruction is supervised only by orthoptists). In general, personnel supervising and assessing student performance must hold the same professional designation/credential as that sought by the student in the program. However, program personnel may have a higher credential related to the profession than the entry level orthoptist; for example, a PhD or Master in Orthoptics could teach and assess an orthoptic student attaining a bachelor's degree. In some circumstances, other qualifications may be appropriate. Specifically, faculty with relevant qualifications to the topic being taught may be used for instruction on the following topics: anatomy and physiology, physical and visual optics, ophthalmic surgery, genetics, pharmacology, learning disabilities and community health.
- 2) Personnel with appropriate and current training: Didactic and clinical site personnel should be prepared for their roles as educators and engage in professional development to remain current with both professional and educational orthoptic practices. The educational institution should support professional development activities for its staff and faculty. Maintenance of clinical knowledge forms part of a

faculty's professional development. Clinical professional development could include, but is not limited to:

- a. Maintenance of competence (as required by orthoptic certification/regulatory bodies)
 - b. Clinical rounds and in-service sessions
 - c. Attendance/presentations at orthoptic workshops and conferences
 - d. Enrolment in profession-related certificate, diploma and degree programs
 - e. Return to clinical practice
 - f. Orientation to new equipment and procedures by industry
 - g. Contributions to orthoptic professional journals
 - h. Participation on orthoptic profession-related committees (e.g., national exam committee, accreditation teams)
- 3) Sufficient personnel: There should be sufficient qualified orthoptic personnel at each didactic site (classrooms and laboratories) to provide the required instruction, supervision and evaluation of student learning. Programs should work closely with clinical/practicum sites to ensure that sufficient orthoptic personnel are available at each clinical/practicum site to supervise and evaluate all students placed at the site.
- 4) Didactic learning resources: Program's didactic and laboratory equipment and resources should provide students with an opportunity to learn and practice orthoptic skills, attain required orthoptic competencies and prepare them for the actual practice setting of the profession.
- 5) Appropriate and equitable learning resources:
- a. Students should have timely, adequate and equitable learning opportunities that enable them to practice and attain required orthoptic competencies.
 - b. The didactic and laboratory components of the program should prepare students adequately for the clinical/practicum placement.
 - c. Clinical/practicum learning opportunities are in the actual practice setting of the profession (hospital, orthoptic clinical unit, orthoptic office, ophthalmology clinic).
 - d. The volume and variety of cases/procedures at the orthoptic clinical/practicum sites are appropriate and sufficient for students to practice and attain the required orthoptic competencies within the published length of the clinical education portion of the program. Rotations to different orthoptic clinical/practicum sites are scheduled when required for attainment of competencies and/or equitable learning opportunities.

C. Requirement: The program supports the student educational interest and protects their rights by providing students with accurate information on the orthoptic profession.

Criterion: Information is provided on the orthoptic profession including: the physical and psychological demands of the practice; the scope of practice of the orthoptist; the practice setting of orthoptic professionals; and the requirements for licensure/certification.

- Programs provide prospective students with information that enables them to make an informed career choice and allows them to be fully aware of the requirements of the profession. Information on the physical or psychological demands of the profession and the practice setting are communicated to the prospective student, as are the scope of practice of the orthoptist and the requirements for certification or licensure. Programs and their clinical sites ensure that students are asked to perform only procedures for which they have the required background knowledge and that are within the scope of practice of the orthoptist.



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APPENDICES

(A-J)

- A. Application Form for Full or Associate Membership
(National Orthoptic Associations)
- B. Application Form for Individual Membership (Orthoptists)
- C. Application Form for Associate Membership
(Ophthalmologists)
- D. Application Form for Affiliation
- E. Proxy Appointment
- F. International Orthoptic Congress Agreement between IOA
and National Association
- G. Email Policy Agreement
- H. Memorandum of Understanding with the International
Strabismological Association (ISA)
- I. IOA Congress Bid Invitation & Planning Guide
- J. Preparing an IOA Congress Bid

Application Form – Full or Associate Membership (National Orthoptic Associations)



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Representatives of National Orthoptic Associations seeking membership with the International Orthoptic Association (IOA) with a seat or observer status on the IOA Council of Management are requested to complete this form.

All questions should be answered in English and must be typed.

1. Date form completed:
2. Name of country:
3. Exact name of your association:
4. Year of formation of your association:
5. Number of current members in your association:
6. Name, address, telephone, fax number and e-mail of your present chairperson:
7. Name, addresses, telephone, fax number and e-mail of the orthoptist who will be corresponding with the IOA:
<p>8. What categories of membership are there in your association?</p> <p><input type="checkbox"/> Full</p> <p><input type="checkbox"/> Associate</p> <p><input type="checkbox"/> Honorary</p> <p><input type="checkbox"/> Student</p> <p><input type="checkbox"/> Other (please specify): _____</p> <p>a) What are the requirements for each membership type in your association:</p> <p>b) What voting rights are held by each category of membership in your association (i.e., full members have full voting privileges, etc.):</p>
<p>9. Is your national membership open to orthoptists exclusively?</p> <p><input type="checkbox"/> YES</p>

Application Form – Full or Associate Membership (National Orthoptic Associations)



INTERNATIONAL
ORTHOPTIC
ASSOCIATION

<p><input type="checkbox"/> NO</p> <p>a) If NO, please check the professions of those admitted as members who are not orthoptists:</p> <ul style="list-style-type: none"><input type="checkbox"/> Ophthalmologists<input type="checkbox"/> Doctors in general practice<input type="checkbox"/> Opticians<input type="checkbox"/> Nurses<input type="checkbox"/> Ophthalmic Aids / Assistants<input type="checkbox"/> Optometrists<input type="checkbox"/> Ophthalmic Assistants, Technicians and/or Technologists<input type="checkbox"/> Other (please specify): <p>b) Are these non-orthoptist members provided equal voting privileges?</p> <ul style="list-style-type: none"><input type="checkbox"/> YES<input type="checkbox"/> NO <p>c) What voting conditions are applied (if any) for non-orthoptic members?</p>
<p>10. State briefly the objectives of your association:</p>
<p>11. Where can an orthoptist work in your country? (In hospitals, private practices, rehabilitation centres, vision screening, independently, others):</p>
<p>12. Is there more than one organisation representing orthoptists in your country?</p> <ul style="list-style-type: none"><input type="checkbox"/> YES<input type="checkbox"/> NO <p>If YES, please explain the arrangements (e.g. geographical, state, provincial, etc.):</p>
<p>13. Is the orthoptic profession officially recognised in your country?</p> <ul style="list-style-type: none"><input type="checkbox"/> YES If YES, do orthoptists enjoy the privileges of State Registration? <input type="checkbox"/> NO If NO, how is the orthoptic profession recognized/governed in your country?

Application Form – Full or Associate Membership (National Orthoptic Associations)



INTERNATIONAL
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ASSOCIATION

14. Is there a national qualifying examination, which permits orthoptists to practice?

YES

a) Name of the qualification:

b) Name of the certificate/diploma/degree/license:

****PLEASE ENCLOSE A COPY OF A TYPICAL CERTIFICATE/DIPLOMA/DEGREE****

NO

Please describe how orthoptists are selected to perform their duties:

15. Can orthoptics be practiced in your country without passing a qualifying examination?

YES

NO

16. Is there more than one qualification which permits orthoptists to practice?

YES

Please state the names of the other qualifications that are acceptable:

NO

17. Are orthoptists with foreign qualifications permitted to practise in your country?

YES

If YES, are all foreign qualifications recognized?

YES

NO. Please state the selected qualifications that are recognized:

NO

18. Is there a recognised orthoptics education program in your country?

YES

a) Recognised by whom?

b) Is this a national program or are there regional or individual programs as well?

c) How many schools/universities are currently educating orthoptic students?

d) How many students are there currently enrolled in your country?

Application Form – Full or Associate Membership (National Orthoptic Associations)



INTERNATIONAL
ORTHOPTIC
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<input type="checkbox"/> NO. If you have answered NO, you can only apply for ASSOCIATE MEMBERSHIP. Proceed to question 27 to complete the application.
<p>19. What level of education is required to study orthoptics? Level of education =</p> <p>a) Is this equivalent to university entrance standards?</p> <p><input type="checkbox"/> YES <input type="checkbox"/> NO</p> <p>b) Is this equivalent to nursing school entrance standards?</p> <p><input type="checkbox"/> YES. What level of nursing education? Is it higher or lower?</p> <p><input type="checkbox"/> NO</p> <p>c) Is this equivalent to other allied health professions?</p> <p><input type="checkbox"/> YES <input type="checkbox"/> NO</p>
<p>20. Does a national syllabus exist?</p> <p><input type="checkbox"/> YES If YES, who is responsible for developing and approving the national syllabus?</p> <p>*PLEASE SUPPLY AN UP-TO-DATE SYLLABUS (OR COPY) AND A SUMMARY IN ENGLISH*</p> <p><input type="checkbox"/> NO</p>
<p>21. How is the syllabus implemented?</p>
<p>22. How is the education of orthoptics organised?</p> <p><input type="checkbox"/> University Course</p> <p><input type="checkbox"/> Undergraduate (BA – BSc)</p> <p><input type="checkbox"/> Graduate (Master – PhD)</p> <p><input type="checkbox"/> School / Academy</p> <p><input type="checkbox"/> Apprenticeship</p>
<p>23. What is the duration of orthoptic education?</p> <p>a) Please give a description of the typical schedule (years, hours, full-time or part-time, holidays):</p> <p>b) How many theoretical lessons/lectures are given?</p>

Application Form – Full or Associate Membership (National Orthoptic Associations)



INTERNATIONAL
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<p>c) How is clinical instruction given?</p> <p>d) If the number of theoretical and clinical lessons/lectures are different from one school to another, please state how:</p>
<p>24. Do the clinical lessons include supervised practical work?</p> <p><input type="checkbox"/> YES If YES, under whose supervision is the practical work undertaken?</p> <p><input type="checkbox"/> NO</p>
<p>25. Explain the examinations in detail (oral/written, how many, in which subjects, theoretical/practical, at what stages in the education, etc.):</p>
<p>26. Describe the practical/oral examinations, if any are held:</p>
<p>27. Is your national association prepared to send a representative to attend the IOA Council, which meets each year?</p> <p><input type="checkbox"/> YES...You can apply for FULL MEMBERSHIP</p> <p><input type="checkbox"/> NO...You can apply for ASSOCIATE MEMBERSHIP</p>

Signature of the National Chairman

Date

Application Form – Full or Associate Membership (National Orthoptic Associations)



INTERNATIONAL
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Remember to submit the following:

1. This completed questionnaire
2. Copy of certificate / diploma / degree / license
3. Syllabus (or copy) and English summary

Please submit completed application packet to:

Daisy Godts, Chairman of IOA Membership Committee
Antwerp University Hospital, Dept. of Ophthalmology
Wilrijkstraat 10
B 2650 Edegem, BELGIUM

Application Form – Individual Membership (Orthoptists)



INTERNATIONAL
ORTHOPTIC
ASSOCIATION

Orthoptists seeking Individual Membership with the International Orthoptic Association (IOA) are requested to complete this application form in full.

All questions should be answered in English and must be typed.

1. Date form completed:
2. Family name:
3. Given name: Title:
4. Full address: Work Telephone: Home Telephone: Fax Number: E-mail address:
5. Qualification: University/hospital/school: Date:
6. Where do orthoptists practice in your country? (In hospitals, private practices, rehabilitation centres, vision screening, independently, other):
7. Is the orthoptic profession officially recognised in your country? <input type="checkbox"/> YES If YES, do orthoptists enjoy the privileges of State Registration/Licensure? <input type="checkbox"/> YES <input type="checkbox"/> NO If NO, how is the orthoptic profession recognized/governed in your country? <input type="checkbox"/> NO
8. Is there a national qualifying examination which permits orthoptists to practice? <input type="checkbox"/> YES a) Name of qualification:

Application Form – Individual Membership (Orthoptists)



INTERNATIONAL
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b) Name of certificate / diploma / degree:

****PLEASE ENCLOSE A COPY OF YOUR CERTIFICATE / DIPLOMA / DEGREE****

NO

If NO, how do orthoptists qualify to perform their duties?

9. Can orthoptics be practiced in your country without passing a qualifying examination?

YES

NO

10. Is there more than one qualification which permits orthoptists to practice?

YES. If YES, please state the names of the other qualifications that are acceptable:

NO

11. What level of education is required to study orthoptics?

Level of education =

a) Is this equivalent to university entrance standards?

YES

NO

b) Is this equivalent to nursing school entrance standards?

YES. What level of nursing education? Is it higher or lower?

NO

c) Is this comparable to other allied health professions?

YES

NO

Signature of Applicant

Date

Application Form – Individual Membership (Orthoptists)



INTERNATIONAL
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Remember to submit a copy of your certificate / diploma / degree with application.

Please submit completed application to:

**Daisy Godts, Chairman of IOA Membership Committee
Antwerp University Hospital, Dept. of Ophthalmology
Wilrijkstraat 10
B 2650 Edegem, BELGIUM**

Application Form – Associate Membership (Ophthalmologists)



INTERNATIONAL
ORTHOPTIC
ASSOCIATION

Ophthalmologists seeking Associate Membership with the International Orthoptic Association (IOA) are requested to complete this application form in full.

All questions should be answered in English and must be typed.

1. Date form completed:
2. Family name:
3. Given name: Title:
4. Education: a) University: Date: b) Area of speciality: Date:
5. Full address: Work Telephone: Home Telephone: Fax Number: E-mail address:

Signature of Applicant

Date

Please submit completed application to:

**Daisy Godts, Chairman of IOA Membership Committee
Antwerp University Hospital, Dept. of Ophthalmology
Wilrijkstraat 10
B 2650 Edegem, BELGIUM**

Application Form – Affiliation



INTERNATIONAL
ORTHOPTIC
ASSOCIATION

Persons seeking affiliation with the International Orthoptic Association (IOA) are requested to complete this application form in full.

All questions should be answered in English and must be typed.

1. Date form completed:
2. Family name:
3. Given name: Title:
4. Qualification (CV): a) University: Date: b) Other qualification: Date: c) Referee 1 (suitable local referee): d) Referee 2 (IOA member):
5. Full address: Work Telephone: Home Telephone: Fax Number: E-mail address:
6. Motivation of affiliation:

Signature of Applicant

Date

Application Form – Affiliation



INTERNATIONAL
ORTHOPTIC
ASSOCIATION

Please submit completed application to:

**Daisy Godts, Chairman of IOA Membership
Committee**

**Antwerp University Hospital, Dept. of
Ophthalmology**

Wilrijkstraat 10

B 2650 Edegem, BELGIUM

Proxy Appointment



INTERNATIONAL
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I, _____ of _____

a member of the International Orthoptic Association Limited, hereby
appoint _____

of _____

and failing him, _____

of _____

to vote for me and on my behalf at the Council or General Meeting of the
Association to be held on the ____ day of _____, 20__ and
at every adjournment thereof.

As witness my hand this _____ day of _____, 20__

Signature

(NOTE: The instrument appointing a proxy shall be deemed to confer authority to demand or
join in demanding a poll.)

International Orthoptic Congress AGREEMENT



INTERNATIONAL
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ASSOCIATION

AGREEMENT

between

International Orthoptic Association Limited

and

Name of National Association

Relating to the XIVth International Orthoptic Congress in

City and Country

Dated _____

2016

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Appendix F

INITIALS: _____
National Association Chair Congress Organising Committee Chair

International Orthoptic Congress AGREEMENT



INTERNATIONAL
ORTHOPTIC
ASSOCIATION

This Agreement is made this _____ day of _____, 20_____

Between the INTERNATIONAL ORTHOPTIC ASSOCIATION LIMITED (hereinafter called “the IOA”) whose registered office is at RPG Crouch Chapman LLP, 62 Wilson Street, London EC2A 2BU, United Kingdom and the _____

_____ (hereinafter called “the National Association”) whose address is _____

Whereas:

It has been agreed that the National Association shall organise the _____

International Orthoptic Congress to be held in _____

and the parties hereto have agreed that their rights, duties and obligations in respect of said Congress will be those set out in this Agreement,

It is hereby agreed as follows:

- 1) This Agreement shall be governed by the law of England and Wales.
- 2) It is agreed that the authority and responsibility for the International Orthoptic Congress (hereinafter called “Congress”) shall, subject to the provisions of this Agreement, be with the IOA by virtue of the international character of the Congress and the IOA’s financial obligations in respect of the Congress as set out in this Agreement.
- 3) The “Guidelines for the International Orthoptic Congress” (hereinafter called “the Guidelines”) are attached hereto and are made a part of this Agreement. In the event of any discrepancy between the provisions of this Agreement and the Guidelines, the provisions of this Agreement shall prevail. The National Association acknowledges and



AGREEMENT

agrees that it will conduct itself and will organise the Congress in accord with the letter and the spirit of the Guidelines and this Agreement.

- 4) The National Association has established an organising committee known as the Congress Organising Committee. The Congress Organising Committee shall have the responsibility for planning and organising the Congress according to this Agreement and the Guidelines. The membership of the Congress Organising Committee shall be determined by the National Association but shall include as ex-officio voting members, the President and the Secretary of the IOA. The Congress Organising Committee shall have a Chairman and a Treasurer each of whom shall be members of the National Association, but the Treasurer of the Congress Organising Committee shall be someone other than the Treasurer of the National Association. The Congress Organising Committee shall act as agent for and on behalf of the IOA in organising the Congress and it shall be accountable directly to the IOA. The Congress Organising Committee's obligations, duties and role shall be set out in this Agreement and in the attached Guidelines.
- 5) In the event that the Congress Organising Committee does not comply with the provisions of this Agreement, including the Guidelines, to the reasonable satisfaction of the IOA, the President of the IOA shall have the right, at her discretion, to dismiss any or all the members of the Congress Organising Committee and replace the removed members with persons chosen by the IOA.
- 6) This Agreement shall constitute a letter of authority that the Congress Organising Committee is the agent of the IOA for the limited purpose of organising the Congress and authorising the Committee to act as agent of the IOA pursuant to the terms of this Agreement.
- 7) The Congress will be funded by the IOA in the following manner: On or about _____January_____the IOA will provide an interest-free loan to the amount of _____pounds Sterling to the Congress Organising Committee for its use in organising the Congress according to the terms and conditions of this Agreement and the Guidelines. These funds shall be repaid pursuant to paragraph eleven (11) below.
- 8) It is understood that the Congress will be financed mainly by the IOA. One year prior to signing of the Contract, the Congress Organising Committee shall submit a preliminary



AGREEMENT

budget to the IOA for approval. A revised budget which includes the amount of estimated expenses and the approximate time of payment shall be provided within two (2) months following the signing of the Contract. If the budget shows that the funds will not cover the expenses, the Congress Organising Committee shall ask permission of the IOA to raise a loan for the uncovered expenses. The decision about the amount of the loan is within the responsibility of the IOA. The approval will be given in writing both by the President and the Treasurer of the IOA. Furthermore a forecast shall be reported in writing every six (6) months to the President, Secretary and Treasurer of the IOA. It is further understood that all funds received by the Congress Organising Committee in connection with the Congress, including the loan set forth in paragraph seven (7) above and all registration fees, royalties, license fees and other payments whatsoever, are IOA funds and will be held by the Congress Organising Committee in trust for the IOA.

- 9) The National Association shall not mix its funds with those of the Congress Organising Committee or with any IOA funds. The Congress Organising Committee shall establish a separate bank account into which all funds related to the Congress, including all funds loaned by the IOA, shall be deposited. All cheques drawn on said account shall require the signatures of both the Chairman and the Treasurer of the Congress Organising Committee. The Congress Organising Committee shall maintain separate books and records, including appropriate ledgers, records and books of account, and shall record all receipts and expenditures pursuant to generally accepted accounting methods. The Congress Organising Committee shall record all expenses and receipts and shall make four (4) monthly financial reports in writing to the President, Secretary and Treasurer of the IOA. The bookkeeping system utilised by the Congress Organising Committee shall be subject to the approval of the IOA. All books of the Congress Organising Committee, including all ledgers, records, books of account and bank statements, shall be open for inspection by the IOA upon request.
- 10) In the event that the Congress Organising Committee does not properly account for receipts and expenditures as set forth in paragraph nine (9) above or in the event that it fails to maintain proper ledgers, accounts and records as set forth in paragraph nine (9) above, or to make said ledgers, records, books of account and bank statements available for inspection by the IOA, then the President of the IOA, at her discretion, may declare



AGREEMENT

this Agreement null and void and the Congress Organising Committee and the National Association shall return all amounts paid to them by the IOA, and any additional funds received by them in respect of the Congress, to the IOA within five (5) working days of the date of notification from the IOA. In the event that such funds are not returned, the IOA will be entitled to charge and collect interest on said unreturned funds at the rate of twelve percent (12%) per annum from the date of the loan as set forth in paragraph seven (7) above until the date of repayment.

11) Within six (6) months following the conclusion of the Congress, the Congress Organising Committee and the National Association shall pay to the IOA the net profits from the Congress. Net profits shall mean total revenues less total expenses, including the IOA funds loaned pursuant to paragraph seven (7). The National Association and the Congress Organising Committee shall, simultaneously with the payment of said funds, provide a full and final accounting of all receipts and expenditures in connection with the Congress and shall provide to the IOA, upon request, a complete set of books and records maintained by it. Any funds due to the IOA that are not paid within six (6) months following the last day of the Congress shall bear interest at the rate of twelve percent (12%) per annum commencing on the due date of said funds. The National Association agrees that it shall be responsible and liable for the payment of all funds due the IOA.

12) At the discretion of the Council a payment may be made to the National Association equivalent to 20% of the net profit.

13) In this Agreement where the context so requires the female gender shall be deemed to include the male gender and the singular to include the plural. Any agreement or covenant given under or in pursuance of this Agreement by two (2) or more persons shall be deemed to be given jointly and severally.

International Orthoptic Congress AGREEMENT



INTERNATIONAL
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As Witness the hand of _____

on behalf of the IOA

the hand of _____

on behalf of the National Association

and _____

on behalf of the Congress Organising Committee

this _____ day of _____, 20 _____

Signed for and on behalf of the International Orthoptic Association Limited:

President

Secretary or Treasurer

Signed for and on behalf of the National Association:

Chairman/President

Signed for and on behalf of the Congress Organising Committee:

Chairman

E-Mail Policy Agreement



Agreement to Abide by the International Orthoptic Association (IOA) E-Mail Policy

I _____ in my position of IOA Webmaster do agree to abide by the rules set out in IOA policy for the use of members' e-mail addresses and membership lists.

The lists/database of members' e-mail addresses and membership lists will remain in my safekeeping for such time as I may hold the position of Webmaster.

Following my retirement from the position of IOA Webmaster/official IOA record keeper the (database) information in my position will be handed over on instruction of the Officers of the Association to my successor.

Webmaster / Official IOA record keeper

Date

Memorandum of Understanding between the IOA and the ISA



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MEMORANDUM OF UNDERSTANDING
between the
INTERNATIONAL ORTHOPTIC ASSOCIATION
and the
INTERNATIONAL STRABISMOLOGICAL ASSOCIATION

Memorandum of Understanding between the International Orthoptic Association (IOA)
and the International Strabismological Association (ISA)

2014

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Memorandum of Understanding between the IOA and the ISA



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Purpose

The purpose of this Memorandum of Understanding (MOU) is to strengthen the relationship between the International Orthoptic Association (IOA) and International Strabismological Association (ISA). This MOU will create a framework for cooperation that will enable each group to benefit from the common activities in their respective strategies. This agreement is made in mutual recognition that the IOA and the ISA have long shared interests and objectives and see the interaction and collaboration of orthoptists and strabismologists/pediatric ophthalmologists as crucial in developing good care for patients.

Background

The International Orthoptic Association represents the national orthoptic associations from 22 member countries and has approximately 12,000 members. The IOA is officially registered as a UK charity and its secretariat is located in London, England. The IOA is run by its Council of Management (representative from each member country) and its Association officers (President, Secretary and Treasurer). The IOA has a program-based structure with five programs that work together to achieve the aims and objectives of the Association. The five programs are: International Cooperation; Education and Research; Standards and Quality; Promotion and Development and Operations Management.

The International Strabismological Association was formed in 1966. ISA represents ophthalmologists and non-ophthalmologists with a special interest in strabismology from 58 countries and has over 350 members. The ISA is officially registered in the US as a non-profit organization and its secretariat is located in Indianapolis, Indiana. The ISA is run by its Administrative Council (20 representatives elected by the membership) and is headed by the Executive Committee (President, First Vice President, Second Vice President, Secretary/Treasurer, and Editor). The aims of the ISA are: a) to disseminate knowledge on all sensory and motor aspects of strabismus and other disorders of ocular motility; b) to foster clinical and experimental research; c) to encourage and support countries wishing to set up organizations for the study and treatment of strabismus and associated sensory disorders; d) to create, as far as possible, a common terminology and a standardization of diagnostic and therapeutic procedures; and e) to relate closely to the International Council of Ophthalmology and officially represent the specialty of strabismus and disorders in ocular motility at the International Congress of Ophthalmology.

The International Strabismological Association and the International Orthoptic Association have benefitted mutually from participation in scientific and educational events such as the ISA Congress and the IOA Congresses since 1999. This MOU will consolidate what has been a rewarding bond between two international organizations by making the relationship official and the collaboration proactive.

Structure of the Cooperation

- A. The established mechanism for communication and information exchange between the two organizations will be:

Memorandum of Understanding between the IOA and the ISA



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- Appointment of a designate from within each organization who will be its principal liaison for issues related to this agreement, and who will communicate regularly with the other organization's liaison about such issues
 - Reciprocal honorary membership for current and future ISA Presidents and IOA Presidents in each other's organization
 - Each party will provide the other with the opportunity for agreed representatives to participate in its meetings of the relevant working committees or activities of mutual interest to the two organizations
 - The executives of the ISA and IOA will meet every two years
- B. The mechanisms through which members of each organization will become better informed about the mission, activities, and issues of importance to the other organization
- Publicize the other organization's Congresses and any activities of general interest from the other organization via its publications, websites or other appropriate venues
 - Encourage reciprocal associate membership among members
 - Establish on its Website a link to the other organization's site indicating the collaborative relationship and liaison contact information
 - Invite the other organization to contribute articles and other appropriate submissions for its organizational publications

Commitments to Collaborate:

- A. The IOA and ISA Congresses should always be held two years apart of the other.
- B. Reciprocal invitation for symposia at the scientific congresses of each organization
- C. Reciprocal invitation to participate in the Scientific Programme committee of each other's Congress
- D. Promote educational activities of the other organization whenever possible
- E. Sponsor and jointly organize symposium or other educational activities when appropriate (for example the WOC)
- F. Collaborate on education issues of mutual interest
- G. Collaborate on quality and standards of care
- H. Cooperate on research activities of mutual interest to the both organizations.
- I. Collaborate on development and or presentation of projects addressing issues within the mission and expertise of each organization.

Memorandum of Understanding between the IOA and the ISA



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Implementation and Revision of this Agreement

This agreement does not itself authorize the expenditure or reimbursement of any funds. Nothing in this agreement shall obligate the parties to expend appropriations or monies, or to enter into any contract or obligation.

Further, this agreement shall not be interpreted to limit, supersede, or to otherwise affect the either party's normal operations or decision in carrying out its mission, or its statutory and regulatory duties.

This Memorandum of Understanding will become effective upon the signature of the authorized officials of the respective parties. It will remain in effect until terminated by either party. One party or the other must serve the notice of termination at least (90) days prior to the effective date of that termination, or in the case if mutual consent, with no prior notice requirement. The Memorandum will be reviewed every four years and it may be amended by mutual agreement of both parties in writing.

Karen McMain

President
International Orthoptic Association

December 11, 2014

Date

Seyhan B. Ozkan

President
International Strabismological Association

December 18, 2014

Date

IOA Congress Bid Invitation & Planning Guide



This document has been prepared to guide National Associations contemplating making a bid to host a future IOA Congress. It summarizes key Congress elements and introduces roles and responsibilities of the IOA and Host Association.

Invitation to submit a bid

The annual International Orthoptic Congress is an important forum, allowing host associations, their members and colleagues from around the world to exchange ideas. It also affords the local hosts the ability to showcase their city and institution.

To assist you in preparing a bid, we have developed a comprehensive Congress Bid Planning guide. The formal bid needs to include only a letter of intent, a description of the city/venue, and a very preliminary “broad-brush” Congress plan that includes financial considerations and plans to attract delegates and exhibitors.

Each IOA Representative will inform his/her national association of the deadline to submit a Congress bid.

The completed bid should be sent to:

The IOA President: president@internationalorthoptics.org

and copied to IOA Secretary: secretary@internationalorthoptics.org

About the IOA Congress:

Held every four years, the IOA Congress is the most important orthoptic meeting in the world. The scheduling of this meeting will be up to the host Association. Care should be made to avoid conflict with other major conferences that might reduce attendance of a significant number of IOA members.

During the IOA Congress hundreds of orthoptists from around the world meet to:

- Communicate results of their research
- Learn about new developments in their profession
- Exchange ideas about teaching
- Celebrate and honor the achievements of the Burian Lecturer and Congress Scientific Prize winners
- Conduct business of the association via the Annual General Meeting
- Network with colleagues from the host country and abroad

IOA Congress Bid Invitation & Planning Guide



The first International Orthoptic Congress was organized in July 3rd, 1967. At the conclusion of that meeting the International Orthoptic Association was formed.

Attendance at IOA Congresses typically ranges between 300-350 delegates when the Congress is held outside of Europe and 450 – 500 when held in Europe. The official language of the IOA Congress is English.

The Congress bears the name of the Association and is financed by the Association. The name of the Congress is the International Orthoptic Congress. The Association retains full authority over its organisation, the scientific programme, and all fiscal matters. While it is expected that each host association/Congress Organizing Committee (COC) will practice appropriate and sound financial management and will make every effort to return the maximum possible revenue to the association, it must be recognized that the IOA bears full financial responsibility in the event that the minimum revenue return is not met. It is the responsibility of the host association/Congress Organizing Committee to prepare and maintain a realistic and detailed Congress budget.

Benefits to the Host Association:

Hosting a Congress, with its associated publicity, gives an association the opportunity to showcase the accomplishments of its orthoptic researchers, teachers and clinicians, as well as its orthoptic university departments and or hospital based programs to a wide audience. This in turn raises the profile of the association, its members and programs on a global scale. On a national scale, hosting a Congress can raise the profile of the association with orthoptists, other eye care professions and with the public. Hosting a Congress can also have a direct benefit to the city where the venue site is located through its conference, hospitality and food services.

Preparing a Congress Bid:

An IOA member association which seeks to host a future IOA Congress must submit a formal bid to the IOA President. The IOA Council of Management (COM) will consider the bid and will vote to approve or reject it depending on the feasibility of the proposal based on the submitted information. Associations can make a formal presentation at the IOA Council of Management meeting upon request prior to any COM vote. The formal bid needs to include only:

1. A letter of intent
2. A description of the city/venue
3. A very preliminary “broad-brush” Congress plan that includes:

IOA Congress Bid Invitation & Planning Guide



- a) Financial considerations
- b) Plans to attract delegates and exhibitors

Committees and Advisory Structures:

The responsibilities for various elements of an IOA Congress are assigned to appropriate committees, as summarized below. The key responsibilities of the host association are fulfilled by the Congress Organizing Committee, as described more fully in the next section.

Congress Organizing Committee (COC):

The Congress Organizing Committee (COC), which is overseen by a chair appointed by the host association, is responsible for overseeing all local arrangements for the Congress. The number of COC members is up to the host association but at least one member should act as Treasurer. This committee is directly responsible for booking a venue, catering, audiovisual arrangements, social programming, Congress publicity, meeting signage, registration, and exhibitor arrangements. It is advisable that a Professional Congress Organizer be used for Congress arrangements.

Congress Scientific Program Committee (CSPC):

The Congress Scientific Program Committee (CSPC) is responsible for the planning and coordination of the Congress program including plenary session talks, any technical sessions, workshops, invited symposium, the Burian Lecture, judging of Congress Scientific prizes, production of Congress transactions and publication of Congress Medline publications. The CSPC chair is elected by Council. The committee members consist of an elected experienced member, a host country member, and two additional members ideally with international representation.

Preparing an IOA Congress Bid



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ORTHOPTIC
ASSOCIATION

Congress Bid Presentations are made at the IOA Council of Management meeting that occurs six (6) years before the proposed Congress year. Bid presentations can take any format (multiple/single presenters, PowerPoint, videos, multimedia). Bidders are invited to take up to 20 minutes to present their bid the IOA Council of Management with an additional 10 minutes for questions. Travel and accommodations for those making the bid presentations are the responsibility of the bidding organization. No gifts should be provided to Council members at any stage in the bidding process.

Items to consider including in your bid presentation:

- Names of the individuals and roles they might play on your proposed organizing committee. Providing prior experiences with organizing a conference would be helpful.
- General information on the city proposed for the meeting such as population, attractions, cultural activities, infrastructure, climate and cuisine.
- Discuss accessibility of the city by air: average flying hours from the major cities in the world from where orthoptists would be traveling, direct flights to and from, frequency, airlines that use this airport, how easily can you travel from the airport to hotels or the congress venue. What is the accessibility of this city by rail or road if relevant?
- Information Council should know about the Country such as availability of city or state subsidies, taxes, political stability, tourist information, legal requirements for entry and custom regulations.
- Provide some specific information on your proposed venue for the Congress: the venue location, distance from city centre, distance from hotels, public transportation to venue, what other large meetings have been held at this venue in the past successfully, the number and size of meeting rooms, their seating capacity, and size of the exhibit area, floor plans, capacity for simultaneous translation, availability of WiFi.
- What is the availability of in-house audio-visual, catering, exhibit construction services, customs brokers etc.? Does the facility have any restrictions for use of services other than in-house?
- Availability of reliable agencies for housing, audio-visual services, transportation, etc. through private companies.
- Documentation on hotels: categories, price ranges, distance from conference centre, number of sleeping rooms within walking distance and number of sleeping rooms within reasonable local transport from conference centre.
- Preliminary plans for a social program.
- Endorsements by local or national societies, health authorities, civil authorities, government, etc.
- Possible financial support or guarantees from local or national governments.
- Relationships with sponsors or exhibitors that might contribute to the proposed meetings success

Preparing an IOA Congress Bid



- Proposed dates for the Congress - what regional, national or international meetings being held around the same time?

Final Decision:

The IOA Council of Management will vote on the bid submissions. The IOA President will only vote in the event of a tie vote. The decision will be known at the end of the COM meeting which occurs six (6) years before the proposed Congress year; which is two (2) years before the next Congress. Formal announcement of the winning bid will be made at the end of the next Congress.