



Policies & Procedures Manual
Revised November 2014

TABLE OF CONTENTS

OFFICERS AND EXECUTIVE DIRECTOR.....	4
PRESIDENT	4
PRESIDENTIAL NOMINATING COMMITTEE	4
BOARD OF DIRECTORS	4
USE OF NATA-ISSUED CREDIT CARD.....	5
CONFLICT OF INTEREST POLICY	5
DIRECTORS-ELECT	6
PROXY VOTING AT BOARD MEETINGS	6
EXECUTIVE DIRECTOR	6
COMMITTEES.....	8
GENERAL INFORMATION	8
COLLEGE/UNIVERSITY ATHLETIC TRAINERS' COMMITTEE (CUATC)	10
COMMITTEE ON PRACTICE ADVANCEMENT (COPA)	10
COMMITTEE ON PROFESSIONAL ETHICS (COPE)	11
CONVENTION PROGRAM COMMITTEE (CPC).....	11
DISTRICT SECRETARIES/TREASURERS' COMMITTEE (DST)	11
ETHNIC DIVERSITY ADVISORY COMMITTEE (EDAC)	12
EXECUTIVE COMMITTEE FOR EDUCATION (ECE).....	12
POST-PROFESSIONAL EDUCATION COMMITTEE (PPEC).....	13
PROFESSIONAL DEVELOPMENT COMMITTEE (PDC)	13
PROFESSIONAL EDUCATION COMMITTEE (PEC)	13
FINANCE COMMITTEE	14
GOVERNMENTAL AFFAIRS COMMITTEE (GAC).....	14
HONORS AND AWARDS COMMITTEE	14
FELLOWS, HALL OF FAME, MOST DISTINGUISHED ATHLETIC TRAINER, SPECIAL CONSIDERATIONS AND SERVICE AWARD COMMITTEES	15
SPECIALTY AWARDS COMMITTEE.....	15
INTERNATIONAL COMMITTEE.....	15
JOURNAL COMMITTEE	15
NATIONAL ATHLETIC TRAINING STUDENTS' COMMITTEE (NATSC)	16
PUBLIC RELATIONS (PR) COMMITTEE	16
SECONDARY SCHOOL ATHLETIC TRAINERS' COMMITTEE (SSATC)	17
YOUNG PROFESSIONALS COMMITTEE (YPC).....	17
OTHER GROUPS	17
FEDERAL LEGISLATIVE COUNCIL	17
PROJECT TEAMS AND WORKGROUPS.....	17
STATE ASSOCIATION ADVISORY COMMITTEE (SAAC).....	18
NATA THINK TANKS	18

LIAISONS TO OUTSIDE ORGANIZATIONS19

EXPENSE REIMBURSEMENT20

GENERAL GUIDELINES20

ELIGIBLE EXPENSES20

INTERNATIONAL TRAVEL.....21

CORPORATE SPONSORSHIP21

INTELLECTUAL PROPERTY22

VOLUNTEER INTELLECTUAL PROPERTY AGREEMENT22

JOURNAL OF ATHLETIC TRAINING22

NATA LOGO.....22

POSITION STATEMENTS22

COMPETENCIES22

NATA-SPONSORED MEETINGS AND EVENTS.....23

BENEFITS TO VIPs AND VOLUNTEERS PRESENTING OR ASSISTING23

NATA PROMOTION OF COMMERCIAL EVENTS23

CONVENTION REGISTRATION, ATTENDANCE AND EXHIBIT POLICIES.....23

MEMBERSHIP PROCEDURES23

DISCRIMINATION POLICY.....23

APPLICATION FOR MEMBERSHIP23

PROOF OF MEMBERSHIP.....23

DISTRICT AFFILIATION23

MEMBERSHIP CATEGORIES.....24

CHANGE OF STATUS25

DUES.....25

NATIONAL DUES, DUES DISCOUNT AND RELIEF25

DISTRICT AND STATE DUES26

PAYMENT OF DUES26

COLLECTION OF BOC FEE.....26

MEMBER RENEWAL, SUSPENSION AND CANCELLATION.....26

MEMORIAL AND DONATION GUIDELINES26

MEMORIALS.....26

DONATION REQUESTS27

RECORD RETENTION POLICY27

COMPLAINT PROCEDURES.....28

HANDLING COMPLAINTS REGARDING MISREPRESENTATION OF CERTIFICATION.....28

REPORTING AND INVESTIGATING WRONGDOING POLICY.....28

APPENDIX A: BOARD OF DIRECTORS DISCLOSURE STATEMENT AND INTELLECTUAL PROPERTY AGREEMENT29

APPENDIX B: FINANCIAL AND INVESTMENT POLICIES.....30

FINANCIAL POLICIES 30

INVESTMENT POLICY 31

APPENDIX C: GIFT ACCEPTANCE POLICY33

USE OF LEGAL COUNSEL 33
RESTRICTIONS ON GIFTS 33

OFFICERS AND EXECUTIVE DIRECTOR

President

Presidential Nominating Committee

When it convenes at the convention, the Presidential Nominating Committee, comprised of all eligible presidential candidates not seeking nomination, selects two candidates to run on the presidential slate. Nominating committee members each cast a first and second place vote via written ballot. The sitting president serves as chair and submits a sealed ballot to be used only to break a tie if needed. In the event the sitting president is filling an unexpired term and is a candidate, the immediate past-president should chair the committee, lead the meeting and complete a sealed ballot to be used only in case of a tie.

The relevant district board will designate one of its certified members to replace an eligible nominating committee member who declares candidacy or is unable to attend the candidate presentations.

Presentations will be made in open session.

Candidates

Candidates will declare their intent to run for president in November. This will allow time for the candidates to interact with the membership and express their views through NATA and district communication channels.

Selection

The president is selected by the certified membership in a general election held in September prior to the conclusion of the sitting president's term in June.

Term of Office

The president of NATA shall serve a three year, non-renewable term. A vice president who advances to fill a partial term as president will be eligible to declare his/her candidacy in the next election and, if selected, serve one complete term.

Duties

The president

1. Fulfills responsibilities, enumerated in the Bylaws, Policies and Procedures Manual, Articles of Incorporation and other official NATA governance documents.
2. Chairs board meetings.
3. Serves as official spokesperson for the board of directors and the association.
4. Keeps the board of directors informed about association matters.

Stipend

A stipend approved by the board of directors shall be paid annually to the president, to the president's employer or to the person hired to compensate for work time missed due to responsibilities as NATA president.

Board of Directors

Selection

Board members are elected by the districts they represent.

Term of Office

Each board member shall serve a two year term with one renewal option. Board members filling a partial term are eligible to serve two full terms.

Duties

Board members

1. Serve in accordance with the Bylaws, Policies and Procedures Manual, Articles of Incorporation and other official NATA governance documents.
2. Set policy and direction for the association and evaluate progress towards NATA goals and objectives.
3. Attend and participate in board meetings.
 - a. A quorum, 6 of the 10 district directors, must be present to convene a board meeting.
 - b. Per the Articles of Incorporation, NATA's directors may vote outside of a meeting if the majority of the full board approves the specific proposal. This vote is usually taken by an electronic ballot (e-ballot) through e-mail or facsimile. Board members have 7 days to respond to a request. If no response is received, that director's vote is counted as a YES vote. If any director indicates s/he wants more discussion, the vote is tabled until the next board meeting. When an e-ballot is approved, it is put on the next board meeting's consent agenda for ratification, thereby providing a written record of the action in the board minutes.
4. Appoint the executive director.
5. Participate on the Presidential Nominating Committee.

Board Liaisons to Committees

Each year, the president appoints every board member to serve as the liaison to several committees/groups. A board liaison is responsible for the following interactions with his/her assigned groups.

1. Communicate regularly with committee chair to stay up-to-date on committee projects and activities.
2. Contact the chair before each board meeting to become fully informed about relevant agenda items.
3. Present committee agenda items to the board.
4. Promptly notify the chair of pertinent board discussion or action.
5. Handle committee matters as they arise.
6. Recommend/approve appointments of committee members and approve renewals of committee members and chairs.
7. Provide input to the president about current or past committee members who are chair candidates.

Use of NATA-Issued Credit Card

1. A credit card will be issued to NATA board members upon request for the duration of their board or officer term. At the conclusion of that service, the card must be returned to NATA and the account will be deactivated.
2. The card is to be used only for NATA-approved business and travel charges.
3. If a personal charge is inadvertently put on the card, the board member is responsible for reimbursing NATA in a timely manner.
4. Credit card expenses and receipts must be submitted promptly in accordance with the policies set forth on the NATA travel expense form.
5. Disputes or discrepancies regarding expenditures will be resolved by the NATA president, treasurer and executive director.
6. Board members requesting a credit card will be asked to sign a form agreeing to adhere to the NATA-issued credit card policies.

Conflict of Interest Policy

Members of the board of directors must reflect the highest standards of ethical behavior, integrity and public responsibility.

Handling Potential Conflict of Interest

NATA recognizes the inherent right of members of the board of directors to pursue outside interests. However, these outside interests may affect a transaction in which NATA is involved or diminish NATA's ability to conduct objective and unbiased decision-making. If an actual or perceived conflict of interest exists, it is NATA's policy to require disclosure and, whenever feasible, avoidance of actual or potential conflicts of interest. Examples include:

1. Serving as a paid or non-paid consultant to NATA or as a vendor to NATA or one of its subsidiaries or affiliates;
2. Serving in a fiduciary role for another organization that competes with NATA or takes public positions adverse to those of NATA;

3. Receiving from NATA an award, contract, grant or sponsorship in excess of \$1,000 annually;
4. Investing significantly in an entity that deals with NATA in a commercial capacity; or
5. Having family members or business associates with these relationships.

Information suggesting an actual or potential conflict of interest should be communicated to the president, board of directors or executive director. If warranted, the information will be reviewed by the president for evaluation and possible recommendation to the board of directors. The board, not the volunteer making the disclosure, has the exclusive authority and responsibility to decide an appropriate reaction to the disclosure. This may be:

Disclosure

The disclosure of a board member's other interests is worthy of the board's attention. The disclosure itself, and the board's awareness of the disclosure, is considered sufficient to correct for any bias it might entail. The nature of the disclosure and its significance will determine the action, if any, that should be taken regarding the board member and disclosure in question. Thus the board and/or committee will simply take the information into account as the board member participates in decision-making.

Recusal

Another interest that has been disclosed affects an important policy or program for the association. To assure the NATA and its constituency that board decision-making is without bias, it is best for the volunteer to recuse him/herself when the board/committee takes reports, debates or makes decisions, about that policy or program. The board member is asked to leave the room for any discussion on the topic.

Resignation

The other interest relates to a continuing, pervasive and important board or committee function, one that cannot easily be isolated on an agenda so as to permit recusal. In this case, the volunteer may be asked to resign his/her position, if this is the only way to ensure the other interest does not intrude upon and skew board decision-making. This is an extreme and rare result of a board member's disclosure, but it is conceivable.

Disclosure Statement

Board members are asked to sign this policy prior to the beginning of their board terms. Thereafter, they update it at each in-person board meeting, with every director completing a new form each June.
(See Appendix A)

Directors-Elect

Meeting Attendance

Directors-elect are invited to participate (on a non-voting basis) in board meetings prior to taking office.

Meeting Expense Reimbursement

NATA pays the cost of participation in web conferences and approved expenses to attend the two off-convention board meetings preceding the NATA convention at which the director(s)-elect will take office. If a district wishes to send its director-elect to off-convention board meetings prior to that, the district funds the cost of the director-elect's travel, hotel and incidental expenses. NATA pays for the district director-elect's group meals.

Proxy Voting at Board Meetings

When a district director must be absent from a meeting, a certified member designated by the district may take the director's place with full voting privileges.

Executive Director

The executive director serves as the association's chief executive officer. S/he strives to keep the association on track with its strategic initiatives and is responsible for the overall administration of the NATA office, including personnel, services, financial resources, and property.

Selection

Appointed by the board of directors.

Job Duties

The executive director:

- Works closely with the board in fulfilling its responsibility to set policy and direction.
- Helps the board formulate the organization's mission, goals and strategy.
- Keeps the board informed of matters requiring action and provides sufficient information on which decisions can be based.
- Oversees implementation and evaluation of programs and projects.
- Directs the association's organizational and staff structure.
- Has responsibility for the association's financial health and identifies potential revenue sources and current or potential areas of financial concern.
- Maintains relationships with internal and external groups and organizations pertinent to NATA.
- Oversees negotiation of and executes NATA contracts.

Evaluation

The Review Committee, consisting of the president, Finance Committee chair and the vice president, administers the executive director's annual evaluation, which includes the following elements:

- Members of the Review Committee and the board complete and sign an evaluation form.
- The executive director submits a self-appraisal specifying progress made towards goals established the previous year and proposes goals for the coming year. The Review Committee corroborates the proposed goals and may choose to add additional goals.
- The Review Committee may obtain or review other data it considers pertinent, including input from employees.
- The evaluation is presented at an in-person meeting of the executive director and the Review Committee.

Succession Plan

To ensure continuous coverage of executive duties, the board has adopted the following procedures in the case of an extended absence or departure of the executive director.

Short-term absence

For a short-term, temporary absence of less than 90 calendar days, no changes will be made to the structure or reporting system. The office will be run in the same way it is when the executive director is on extended travel or using a block of vacation time. The associate executive director shall be the senior staff person in charge of the office.

Long-term absence

In this case, the executive director is expected to return, but after 90 calendar days.

1. The president will name the associate executive director as acting executive director.
2. The board shall adjust the acting executive director's salary (20%) while s/he oversees the national office and fulfills other executive duties in the absence of the executive director.
3. When the executive director returns to work, the acting executive director shall return to regular capacity and compensation.

Permanent absence

A permanent absence is one in which the board conclusively determines the executive director will not return. If the executive director's departure is permanent, in addition to the steps stated above for a long-term absence, the following actions shall be taken:

1. The president will appoint a search committee comprised of the president, the president-elect (or immediate past-president if there is no president-elect) three board members and a chair. The president may add one at-large member.
2. A search consultant may be procured to assist with the search process. If circumstances warrant, the search committee or a qualified volunteer may fill this role.

Communication

When an acting executive director is appointed, a message from the president shall be sent to key stakeholders, including members, sponsors, key vendors and any other appropriate group or individual.

Update as needed

At the time this plan is needed, the president, vice-president and secretary/treasurer shall review this policy. If it needs to be updated, the officers shall recommend changes to the board.

COMMITTEES

General Information

Composition and Eligibility

Most committees are district-based. Composition of some committees is dictated by relevant expertise or knowledge. Certified regular, certified student and certified international members are eligible to serve on NATA committees, and must maintain certified member status. (See Member Renewal under Membership Procedures.)

A member serving on a district-based committee who moves to another district must give up his/her position on the committee. He or she may remain in that position until a replacement is named by the district director in consultation with the chair, but the member's official service ends when a replacement is selected.

An exception to certified member status is the National Athletic Training Students' Committee, which is populated by non-certified student members.

With the approval of the board, committees may include other individuals who bring specialized knowledge or insight to committee operations.

Beginning in June 2014, all new committee members must have a National Provider Identifier (NPI) number.

If a committee member or chair vacates a position during the year, the date the vacancy is filled determines the new person's service eligibility. Someone selected to fill an opening between June and December will be counted as having a full year of service the following June. This allows for three more years of eligibility for members. A chair would have one year remaining in his/her first two-year term.

A member who joins the committee between January and June will still have four years of eligibility in June. A chair will still have a full two year term to serve.

To avoid overworking volunteers and to allow more members to serve, a general guideline is to limit volunteer assignments to two per member. This is not always possible, but should be kept in mind when appointments are made.

To accept appointment to a committee, members commit to go to the convention and attend other committee meetings.

Joint Committee Meeting

A meeting of committee chairs, members and staff liaisons is held in Dallas each January in conjunction with the NATA board of directors meeting. The Joint Committee Meeting provides enhanced synergy and communication between committees and workgroups, encourages committees to plan and work strategically, and gives staff the opportunity to present key information to multiple pertinent groups. Staff will include travel expenses for the committees during the budgeting cycle.

Selection and Approval Process

When a committee chair position becomes vacant, the committee will be polled to determine if any member(s) wishes to declare candidacy. The president will consider these and other candidates, confer with the board liaison and the candidate(s) district director(s) and make a recommendation to the board for approval. The Executive

Committee for Education and Honors & Awards Committee chairs recommend chairs for committees under their jurisdiction.

District director, committee chair and board liaison collaboration is essential when naming new committee members. The individual who takes the lead in filling a vacancy varies according to the type of committee. As a general rule, in non-district-based committees, the committee chair may drive the process. In district-based committees, typically the relevant district director heads the search.

It is essential for all parties to communicate during the process to avoid misunderstandings. Ultimately, the district director has veto power.

Chair Term of Office/Evaluation

The term for committee chairs is two years. The chair is evaluated annually by the board liaison, committee members and staff liaisons and may be considered for one additional term. Renewals are not automatic, but are based on the chair's evaluation, involvement, contribution and ability to participate.

Chair term limitations are not affected by prior service as a committee member.

Exempt from this policy are chairs of the District Secretaries/Treasurers Committee, the Finance Committee, and workgroups. Also exempt is the chair of the Journal Committee, whose two-year term may be renewed up to two times, for a maximum of six years.

Removal of Committee Chair

The president can recommend to the board of directors removal of a chair currently serving.

Chair Duties

1. Direct the work of the committee.
2. Submit board reports twice annually, plus additional reports as requested. These reports detail committee progress toward the association's strategic goals and include changes in committee structure, recommendations and updates on committee projects.
3. Consult with staff about any new budget requests.
4. Communicate regularly with the board liaison to keep the liaison apprised of committee activities and requests, and stay up-to-date on any board decisions relevant to the committee.
5. To avoid any misunderstandings, the chair communicates with the board liaison to determine in advance the best way to work with the board liaison regarding committee member appointments. The two should ascertain whether any district directors, who have final veto power, prefer to approach committee appointments differently than stated in the Selection and Approval Process section above.
6. Evaluate committee members annually. After reviewing the evaluation results, working to fill vacancies and consulting with the board and staff liaisons, submit an updated committee roster to the national office.

Communication with NATA Office

The committee's staff liaison is the chief point of contact with the NATA office.

Member Term of Office/Evaluation

Committee terms are one year. Committee members are evaluated annually by the committee chair, the board liaison and staff liaison and may be considered for three additional terms. Renewals are not automatic but are based on the member's evaluation, involvement, contribution and ability to participate.

Upon completing service on one committee, a member may serve on a different committee. A member may serve on the same committee after a one-year hiatus.

Exceptions:

- District Secretaries/Treasurers Committee
- Finance Committee
- Journal Committee
- National Athletic Training Students' Committee

Member Duties

Committee members fulfill the charge of the committee under the direction of the committee chair. This involves attending meetings, including in-person meetings, participating in web conferences and conference calls, completing work assignments and keeping up-to-date on committee activities and events.

Meetings

Committees usually convene annually at the convention to conduct committee business. Other than the Joint Committee Meeting, off-convention meetings are generally held via web conference or conference call.

Board Liaisons to Committees

Each year, the president appoints every board member to serve as the liaison to several committees/groups. A board liaison is responsible for the following interactions with his/her assigned groups:

Communicate regularly with committee chair to stay up-to-date on committee projects and activities.

1. Contact the chair before each board meeting to become fully informed about relevant agenda items.
2. Present committee agenda items to the board.
3. Promptly notify the chair of pertinent board discussion or action.
4. Handle committee matters as they arise.
5. Recommend/approve appointments of committee members and approve renewals of committee members and chairs.
6. Provide input to the president about current or past committee members who are chair candidates.

College/University Athletic Trainers' Committee (CUATC)

Composition

This district-based committee is comprised of members from the collegiate setting, an athletic director and an NCAA delegate. It is recommended that each district representative chair a district sub-committee that includes representatives from the following practice settings: NCAA Division IA, IAA, IAAA, II & III; NAIA Division I & II; junior college; certified assistant athletic trainers; athletic directors.

Purpose

Identify and address issues affecting athletic trainers in the college and university setting.

Duties

1. Study and discuss the unique concerns associated with the college/university practice setting.
2. Develop programs and activities to address concerns and enhance the effectiveness of college/university athletic trainers.

Committee on Practice Advancement (COPA)

Composition

This committee is comprised of one member from each district with up to an additional 6 at large members at the discretion of the committee chair and district director liaison to the committee. Committee members will consist of ATs from a variety of practice settings and those with experience in billing, revenue generation, and insurance reimbursement. These settings include, but are not limited to the performing arts, hospital and clinical, physician extender, military, public safety, occupational, youth sports, secondary school, college and university.

Purpose

Advancement of the athletic training profession in business and employment opportunities, compensation, and brand recognition of athletic trainers as health care professionals.

Duties

1. Support staff in job development and improvement efforts.
2. Advocate for athletic trainers employed in clinical and emerging practices settings, and disseminate information about these markets.

3. Study and address the unique concerns of these athletic trainers. Develop programs and activities to meet these needs.
4. Promote and enhance revenue generation by collaborating with other NATA groups and settings and providing information on these topics.
5. Develop and provide resources to help athletic trainers create healthcare models that maximize business opportunities and return on investment.
6. Liaise with athletic training educators to help ensure knowledge, skills and abilities needed to work in emerging practice areas are included in the professional education standards.
7. Collaborate with other NATA groups to promote and enhance these areas.

Committee on Professional Ethics (COPE)

Composition

This district-based committee is comprised of members with an interest or background in ethics.

Purpose

Uphold the NATA Code of Ethics and the Membership Standards, Eligibility Requirements and Membership Sanctions and Procedures. Educate the membership about athletic training and ethics.

Duties

1. Address ethics complaints.
2. Ascertain that the Code of Ethics and the Membership Standards, Eligibility Requirements, and Membership Sanctions and Procedures are up-to-date and not in conflict with federal or state laws, rules and regulations or NATA policy.
3. Inform the membership about ethics and the ethics complaint process.

Convention Program Committee (CPC)

Composition

This district-based committee is comprised of members with suitable background and credentials to plan and work at the NATA convention.

Vice Chair

A vice chair, or chair designate, may be appointed as necessary.

Purpose

Oversee planning and implementation of the NATA convention's educational programming.

Duties

1. Develop educational content and select speakers and moderators for NATA convention sessions, mini-courses and workshops.
2. Review program proposals from NATA committees and affiliate groups to prevent topic duplication and enhance educational quality.
3. Ensure program content falls within the domains of athletic training.
4. Review staff's proposed room assignments and scheduling of presentations.
5. Make recommendations to the board regarding the benefits to VIPs and volunteers who present or assist at the convention.

District Secretaries/Treasurers' Committee (DST)

Composition

This committee is comprised of the district secretaries and treasurers elected or appointed by the ten NATA districts.

Purpose

Serve as a resource to the national office on membership recruitment, retention and related procedures.

Duties

1. Assist with membership recruitment and retention by contacting past-due, former and prospective members and others as requested by the national office.
2. Facilitate placement of members who volunteer for district or state service (via NATA's Call for Involvement).
3. Ensure eligible members are submitted for NATA awards, specifically underrepresented constituencies such as minorities.

Ethnic Diversity Advisory Committee (EDAC)

Composition

This district-based committee is comprised of ethnically diverse certified regular members. The committee may also have one qualified, ethnically diverse graduate student member who can commit to three years of service (if renewed) and who attends the annual convention. This is to ensure the graduate student member can participate in the committee meeting at the convention as well as conference calls. Proof of active graduate student status and letters of recommendation are required.

Purpose

Identify and address issues relevant to ethnically diverse members. Advocate sensitivity and understanding toward ethnic and cultural diversity throughout the profession and the association.

Duties

1. Create an environment conducive to the positive growth and development of a multiethnic and multicultural membership.
2. Increase the body of knowledge and disseminate information on key health care issues and conditions that affect physically active, ethnically diverse individuals (exertional sickling, lactose intolerance, at risk populations, Blount's Disease and hypertension).
3. Advocate for ethnically diverse athletic training students through student mentoring and establishing grants and scholarships.
4. Administer the Bill Chisholm Professional Service Award.

Executive Committee for Education (ECE)

Composition

This committee is comprised of the education committee chairs, the *Athletic Training Education Journal* editor and at-large members. The terms of committee members are determined by their term as committee chair. At-large members serve a one-year term that may be renewed three times. The Professional Development Committee (formerly the Continuing Education Committee), the Post Professional Education Committee and the Professional Education Committee operate under the Executive Committee for Education umbrella. The Board of Certification (BOC), Commission on Accreditation of Athletic Training Education (CAATE) the Convention Program Committee, and the NATA Foundation each designate a representative to serve as liaison to the ECE. The Athletic Training Educators' Conference Chair also liaises to the ECE.

Purpose

The Executive Committee for Education sets the direction for athletic training education. Emphasizing a commitment to improving patient care through an evidence-based approach, the ECE proactively influences best educational practices that reflect the profession's interdisciplinary nature and commitment to learning across the professional's lifespan.

Duties

1. Facilitate quality professional, post-professional and continuing athletic training education.
2. Coordinate the delivery of educational programming for the profession of athletic training.
3. Serve as a resource to groups interested in athletic training education.

Post-Professional Education Committee (PPEC)

Composition

This district-based committee is comprised of members from post-professional graduate degree programs and residency training programs.

Purpose

The mission of the NATA Post-Professional Education Committee is to promote accredited post-professional education programs and credentials that prepare athletic trainers for advanced clinical practice, and research and scholarship, in order to enhance the quality of patient care, optimize patient outcomes, and improve patients' health-related quality of life. The Post-Professional Education Committee seeks to achieve this mission through oversight and promotion of NATA accredited post-professional graduate athletic training education programs and NATA accredited post-professional residency programs, and through the development and oversight of athletic training specialty board certification.

Duties

1. Promote and serve as a resource for post-professional education, including master's and doctoral level education and residency training programs.
2. Oversee athletic training specialty certifications.

Professional Development Committee (PDC)

Composition

This district-based committee is comprised of members from various settings. A Convention Program Committee member liaises with the Professional Development Committee.

Purpose

Coordinate development, delivery and evaluation of professional development offered by the association.

Duties

1. Develop content and identify speakers for professional development events, such as the Athletic Training Educators' Conference and PDC session at the convention.
2. Work with staff to develop quality professional development for athletic trainers.
3. Vet potential professional development and/or certificate (not certification/credential) partners to determine if the quality and validity of their content and delivery meet NATA standards.

Professional Education Committee (PEC)

Composition

This district-based committee is comprised of educators.

Purpose

The Professional Education Committee (PEC) supports the collaborative relationship between the profession of athletic training and the educational process. The PEC emphasizes best practices in didactic and clinical education, faculty and preceptor development, and the overall enhancement of professional education in an effort to prepare athletic trainers who are uniquely qualified to excel within a dynamic healthcare system.

Duties

1. Review and develop the NATA educational competencies/Knowledge, Skills, Abilities (KSAs).
2. Address issues related to professional education and transition to practice.

Finance Committee

Composition

This committee is comprised of current board members. The number of members shall be determined and appointed by the president. The president will appoint a member of the Finance Committee to serve as Secretary/Treasurer and Finance Committee chair with board approval.

Term of Office

Finance Committee members serve one-year, renewable terms.

Purpose

Oversee association finances and investment program.

Duties

1. Examine monthly financial statements to keep apprised of the association's current financial standing and investments.
2. Review the proposed annual operating budget presented by staff. After appropriate revisions, the committee recommends the budget to the board of directors for approval.
3. Determine registration, exhibit and other fees for the NATA convention.
4. Review the association's financial and investment policies (Appendix B) annually and recommend changes to the board of directors as needed.
5. Review the draft audit before it is finalized and presented to the board.
6. Select and recommend to the board the investment manager and audit firm.
7. Monitor investment returns.
8. The chair performs other duties as needed to comply with Form 990 regulations.

Governmental Affairs Committee (GAC)

Composition

This district-based committee is comprised of members with interest or expertise in state legislative or regulatory affairs. Included on the committee are liaisons from the BOC and the COPA.

Purpose

Oversee state governmental relations and regulatory efforts, advocating for regulation favorable to athletic training.

Duties

1. Serve as a resource on the governmental affairs process and support member activities pertaining to state regulation of athletic training.
2. Work with state and local regulatory bodies to facilitate state regulations and laws compatible with athletic training.
3. Recommend positions to the board on specific athletic training regulatory and governmental matters, such as preferred wording for practice acts.
4. Administer the Association's legislative grant program as funded by the board.
5. Recognize state association legislative programs with the annual Daniel L. Campbell Award; and recognize individuals demonstrating legislative leadership with the William T. Griffin Award.

Honors and Awards Committee

Composition

The Honors and Awards Committee is comprised of a chair, plus the chair of each committee under its jurisdiction (Hall of Fame, Most Distinguished Athletic Trainer, Service Award, Specialty Awards, Special Considerations and Fellows). The Most Distinguished Athletic Trainer, Hall of Fame, Special Considerations and Service Award committees are district-based. The Most Distinguished Athletic Trainer and Service Award committees include at

least one representative from the secondary school, collegiate, professional and clinical/industrial/corporate settings. The Fellows Committee is made up of NATA Fellows.

Purpose

Oversee and evaluate the association's honors and awards program.

Duties

Honors and Awards Committee

1. Provide direction to the Honors and Awards committees.
2. Establish nomination submission deadlines and candidate evaluation timelines.

Fellows, Hall of Fame, Most Distinguished Athletic Trainer, Special Considerations and Service Award Committees

1. Evaluate and revise nomination forms and candidate evaluation materials.
2. Evaluate nominations and recommend recipients to the NATA board of directors.

Specialty Awards Committee

1. Evaluate and revise nomination forms and candidate evaluation materials for the President's Challenge Award recipient, honorary members, Gail Weldon Award of Excellence and Eve Becker-Doyle Leadership Award winners.
2. Evaluate nominations and recommend winners of the four awards to the NATA board of directors.
3. Provide oversight as needed for other national awards.

International Committee

Composition

This committee is comprised of members who have worked overseas, lived in an enlisted or civilian military setting outside the U.S., or have other international expertise. The eight funded seats include NATA's liaison to the Canadian Athletic Therapists' Association, and the World Federation of Athletic Training and Therapy president (if the president is a US-based athletic trainer), who serves ex officio. The committee may have unfunded liaisons from professional sports athletic training societies with international exposure. An individual from the Professional Baseball Athletic Trainers' Society (PBATS) is NATA's liaison to the Japan Athletic Trainers' Organization (JATO). That person is an ex-officio member of the International Committee.

Purpose

Address issues of members who live, work or are stationed outside the United States. Assist with international membership recruitment as appropriate.

Duties

1. Develop programs, policies and alliances to assist international members and regular certified members living outside of the United States.
2. Promote the NATA brand and the athletic training profession in the international job market.
3. Review and recommend patronage and sponsor requests by other international organizations, and generally support activities related to World Federation of Athletic Training and Therapy.

Journal Committee

Composition

This committee is chaired by the *Journal of Athletic Training* editor-in-chief, and is comprised of section editors.

Administrative Office

NATA funds editorial and administrative support for the *Journal of Athletic Training* and the *Athletic Training Educators' Journal*. The *Journal* offices are housed on a university campus or at an institution with access to medical databases.

Purpose

Oversee the editorial aspects of the *Journal of Athletic Training*.

Duties

1. Establish the strategic direction of the *Journal of Athletic Training*.
2. Determine *Journal* content.
3. Create and administer editorial procedures.
4. Recruit *Journal* authors.

National Athletic Training Students' Committee (NATSC)

Composition

This district-based committee is comprised of non-certified student members and three certified members who serve as mentors. For a student to be eligible, the candidate must be a sophomore or junior on July 1 the year of appointment or be enrolled in a CAATE-accredited master's program. The candidate must be a student during the entire period of his/her term.

Term of Office

National Athletic Training Students' Committee members serve one-year, once renewable terms.

Purpose

Identify and address issues related to athletic training students.

Duties

1. Implement convention programs and events for students.
2. Increase student membership, student volunteer involvement at all levels and convention student attendance.
3. Provide relevant information on matters impacting the athletic training profession to athletic training students.
4. Promote professional socialization of athletic training students.

Public Relations (PR) Committee

Composition

This committee is district-based and includes liaisons from the NATA Foundation and BOC.

Purpose

Serve as facilitators between national (PR staff and agency), district and state PR programs. Assist with execution of major PR projects.

Duties

1. Serve as a PR resource to members, and organize and lead district public relations committees.
2. Disseminate national PR news to district/state leaders and membership via e-blast, newsletter, social media or other communication method.
3. Assist in identifying appropriate members for media interviews.
4. Assist with National Athletic Training Month (NATM) by developing new programs and themes, reviewing the NATM PR toolkit and judging the annual PR contest.
5. Help develop topics/identify speakers for the National Sportscasters & Sportswriters Association sports medicine seminar. Judge NATA Excellence in Sports Medicine Reporting Award.

Secondary School Athletic Trainers' Committee (SSATC)

Composition

This district-based committee is comprised of members from the secondary school setting.

Purpose

Identify and address issues of concern to secondary school athletic trainers.

Duties

1. Study the unique concerns and responsibilities associated with secondary school athletic training.
2. Develop programs and initiatives to address these concerns.

Young Professionals Committee (YPC)

Composition

This district-based committee is comprised of certified members. Eligible candidates have been NATA members at least one year and are 32 years of age or younger by July 1 of the year in which he/she takes office.

Purpose

Address issues of athletic trainers 35 and younger.

Duties

1. Develop strategies to increase recruitment, retention, volunteer involvement and convention attendance among young athletic training professionals.
2. Provide programs, activities and educational opportunities to address the needs of young professionals.
3. Promote professional socialization of young professionals.

OTHER GROUPS

Federal Legislative Council

Composition

This council is comprised of board members and members of key committees, appointed by the president, and staff. The council is small and flexible by design to allow for speed and responsiveness. Appointees may change when appropriate to address current needs.

Purpose

Determine NATA's federal advocacy agenda.

Duties

1. Participate in phone conferences called by the president or staff to deal with federal legislative issues.
2. Develop federal advocacy agenda for board approval.
3. Approve strategies and approaches to achieve NATA's federal legislative agenda.

Project Teams and Workgroups

General Information

Project teams and workgroups were created to utilize more volunteers in a meaningful and effective way. They enable NATA to be nimble and responsive as issues arise. Project teams and workgroups allow for added flexibility and a shorter time commitment for volunteers.

Project teams and workgroups are formed to complete a specific project or task, and disband when the task has been completed.

A project team is assigned by a committee, a group or staff. No formal appointment process is required.

A workgroup differs from a project team in that the task is usually assigned by the board, and the workgroup is appointed by the president and approved by the board.

Composition

Project teams and workgroups consist primarily of NATA certified members, but may include members from other categories or non-members who can contribute to the task at hand.

State Association Advisory Committee (SAAC)

Composition

The State Association Advisory Committee comprises two representatives of each of the four divisions of states. Divisions are based on size rather than NATA districts in order to facilitate problem-solving among states of similar size and resources. Division 1 caucus – state associations under 200 members, Division 2 – 201 to 450 members, Division 3 – 451 to 800 members, Division 4 – more than 800 members. The chair is chosen by the NATA president and approved by the board.

Purpose

Identify and address issues directly affecting state associations and coordinate leadership development for state leaders.

Duties

1. Draft, review and recommend for board approval policies and procedures related to state associations.
2. Review information materials developed by state associations to ensure consistency with NATA and its committees.
3. Provide a forum for state association leaders to develop leadership skills and attributes.
4. Liaise with the Board of Directors as needed.

Term

Like other committees, SAAC has one-year, three times renewable terms for members, and a two-year, once renewable term for chair.

NATA THINK TANKS

Think Tanks are online groups offering peer-to-peer learning and collaboration and providing avenues for volunteer involvement in the association. Each Think Tank has a moderator to ensure participants have a safe and enjoyable experience.

Moderator Selection

Moderators are chosen for their expertise in the Think Tank content area. Staff may consult association leadership to determine the best fit for each Think Tank.

Moderator Term

Moderator terms are ongoing as long as the moderator is willing and able.

Moderator Responsibility

Moderators serve as the point of contact for all matters related to their Think Tank. They also agree to:

1. Post topics deemed relevant and important to the Think Tank.
2. Generate discussion frequently to keep the Think Tank content fresh and relevant.
3. Log in to the Think Tank at least once a week to read the messages.

4. Remove objectionable content (content that specifically violates the Think Tank Posting Guidelines) and contact the poster to explain the rationale for removal.

LIAISONS TO OUTSIDE ORGANIZATIONS

A member or organization may request a liaison relationship be established between NATA and another entity. Liaison relationships take time and resources to administer. To be instituted, the relationship should be of significant value for both parties.

The board liaison to liaisons is responsible for evaluating prospective groups and, when suitable, recommending a liaison to the board. Assessment is made by determining whether the entity has:

- a logical and relevant connection between the organization's mission and athletic training, and
- IRS 501(c) non-profit status.

NATA links to the websites of liaison groups. When appropriate, these NATA-affiliated organizations are asked to provide complimentary membership or member website access, subscription and/or meeting registration to NATA's appointed liaison to the group. Affiliate groups are eligible to develop and present a session at the NATA convention. A session proposal form must be submitted by the deadline specified and approved by the NATA convention program committee. NATA funds associated AV costs and room rental. The group pays any speaker-related and hand-out expense.

Application Process

1. Applicant submits a letter of interest online. It is reviewed by the volunteer engagement associate and liaison to liaisons prior to being forwarded résumé to his/her district director.
2. The applicant's district director reviews the application and returns it with either a vote of confidence or a concern to the liaison to liaisons.
3. The liaison to liaisons calls the applicant with a "yes" or "no" and notifies the applicant's district director when the application and appointment is complete.

Selection

The board liaison to liaisons appoints a certified member (if appropriate) as the liaison representative to an approved organization.

Term of Office

The term of appointment shall be two years. Liaison representatives may serve one additional term upon approval by the board liaison to liaisons.

Renewals are not automatic, but are based on an evaluation of the liaison's involvement, contribution and ability to participate.

Liaison Duties

1. Arrange to receive complimentary subscription or membership to the organization. Monitor organization's newsletter, journal and other publications.
2. Investigate means of providing relevant NATA information to the organization, such as through its newsletter or other publications, and send that information to the organization.
3. Submit liaison report to the NATA board once a year.

Funded Liaisons

1. Attend organization's meetings and present to or consult with the organization's board, executive committee or CEO.
2. If NATA exhibits at a liaison organization meeting, the liaison is asked to staff the booth.

Unfunded Liaisons

1. Correspond once annually, sharing relevant NATA information with the organization and requesting pertinent information in return.
2. Liaisons who do not already attend meeting(s) of the organization should attempt to arrange in advance for an NATA member attending the meeting to submit a report.

Expenses

A liaison representative shall not incur any expenses for which NATA is responsible unless authorized by the board of directors and included in the budget.

Agreements

A liaison representative is not authorized to make any agreements between NATA and the liaison organization.

Website Links

Organizations with an established NATA liaison relationship may link to the NATA website. NATA may link to the group's website with staff review and approval.

EXPENSE REIMBURSEMENT

General Guidelines

NATA members, employees and non-members may be authorized for travel on NATA business. For the sake of simplicity, NATA-authorized travelers are referred to as members in the following policy.

1. Travel and related expenses must be approved in advance by the executive director, president or board. As a general rule, NATA reimburses the approved traveler for his/her expense only (no family members, colleagues or other members).
2. Members should plan ahead to avoid late conference registration fees, higher airfares and similar costs that escalate as the date gets closer.
3. Many NATA meetings occur at the NATA convention. Since it is expected members will already be attending the convention, NATA generally does not reimburse for member participation at meetings and events held during the convention.
4. NATA does not wish to cause a hardship to those traveling on association business. Upon request, NATA can provide a travel advance to offset out-of-pocket expense. If actual expense is less than the advance received, the member should attach a check made out to NATA for the balance when submitting the expense reimbursement form.
5. Members may submit expenses as they are incurred in advance of the meeting to allow for more prompt reimbursement.
6. Members unable to use a personal credit card for conference registrations and hotel reservations should contact their committee's staff liaison to make alternate arrangements.
7. Members are required to submit a liaison, committee, trip activity or other appropriate report with the reimbursement request.
8. Expense reimbursement requests should be submitted to the appropriate NATA staff liaison within 5 days after the trip/activity.
9. NATA strives to mail expense reimbursement checks within seven days of receiving the reimbursement request.
10. Original receipts must accompany hard-copy, signed expense reimbursement forms. If the member submits a report through NATA's online expense reporting software, the uploaded version of the receipt is acceptable.
11. Charges to the NATA credit card or those billed directly to NATA, such as airfare, should be listed and circled on the expense reimbursement form. Attach the receipt, but do not include the amount in the reimbursable total.
12. NATA provides reimbursement to either the member or the institution where the member is employed.
13. In no case shall a member receive dual reimbursement. If an individual inadvertently receives reimbursement from his/her institution and NATA, the individual should return the duplicate amount to NATA.

Eligible Expenses

Members should exercise discretion when incurring an expense, and should only do so when it is reasonable and necessary.

Transportation

1. Airfare should be secured through the official travel agency of NATA. The least expensive, direct-route flight should be selected. Those who do not utilize NATA's travel agency must obtain competitive rates and submit a flight itinerary to the meetings department.
2. If airline vouchers are available, they should be utilized for flights priced above a specified amount. This figure is set by the meetings department in conjunction with the travel agent and will be adjusted as the economy fluctuates.
3. NATA will fund the cost of checking a bag, but does not pay overweight luggage fees for personal luggage.
4. A member may be reimbursed for driving to a meeting if the total cost of transportation (including mileage, meals on the road, parking and other related costs) does not exceed the least expensive direct-route airfare. Mileage reimbursement, which covers the cost of gasoline and other auto expenses, is paid at the current IRS rate. Parking is not included in mileage calculations and may be submitted.
5. If several members share a vehicle, only the owner of the car is reimbursed for mileage.
6. Prior authorization is required for rental cars, which will be obtained through NATA's official travel agency and may only be driven by members who are authorized drivers.
7. Taxis should only be used when less-expensive alternatives are not feasible. Original receipts must be submitted for fares over ten dollars.

Food

1. Members should eat at moderately-priced establishments.
2. For meals not provided by NATA, a maximum of \$10 for breakfast, \$20 for lunch and \$35 for dinner, for a cumulative total not to exceed \$65 per day is allowed. These amounts are inclusive of food, beverage, tax and tip.
3. Occasionally a member will obtain prior authorization to pay meal expense for others, such as a chair whose committee is funded for a meal. If this is the case, please specify the approved meal function and the diners on the bill.
4. NATA will reimburse for room service charges up to the allowed maximums.
5. NATA does not pay room service tips that are in addition to the delivery fee.
6. Mini-bar usage by members is discouraged because of exorbitant prices. It does not provide the best value for the \$65 per day limit.

Incidental Expenses

1. Members are encouraged to use the most cost-effective technology when communicating electronically. Utilize local or toll-free access numbers for the member's Internet Service Provider when possible.
2. Tips for baggage handling are acceptable but should be reasonable.
3. Tips for taxi fare will be reimbursed up to fifteen percent of the total fare.
4. NATA does not pay housekeeping tips.

International Travel

International travel presents a significant out-of-pocket expense. To alleviate this financial pressure, members approved for international travel may take advantage of the options offered in items 4, 5 and 6 of General Guidelines.

1. International airfare must be booked through NATA's official travel agency.
2. Members book their own conference registration and hotel reservations.
3. Members are responsible for their own currency exchange. Do not send foreign currency to NATA with your expense report to reduce outstanding expense.
4. Members should convert foreign currency to US dollars when submitting expense reimbursement requests. Monthly or online credit card statements should be used to determine actual cost.

CORPORATE SPONSORSHIP

NATA has a corporate sponsorship program to help fund public relations, education, membership services, research and other programs to benefit and enhance the image of the athletic trainer and the profession of athletic training.

The board has directed staff to administer the sponsorship program. Proposals and contracts are generated by NATA staff and signed by the executive director. The board of directors approves companies before staff proceeds with negotiations.

NATA contracts award exclusivity to Founding Strategic Partners at the national and district levels. Districts receive a portion of sponsorship funds. In return, the districts are asked to avoid taking on Founding Strategic Partner competitors as sponsors. Districts are also asked to provide upon request a complimentary district meeting booth and/or title sponsorship of an educational session.

INTELLECTUAL PROPERTY

Volunteer Intellectual Property Agreement

Volunteers are asked to sign a form in which the signee and the NATA agree that work and materials developed, created or written – as a committee, workgroup or board member, or in any other volunteer capacity for NATA – shall be deemed work-for-hire under copyright, intellectual property and other laws. NATA is granted sole and exclusive ownership of all such work. Signee waives all claims and/or so-called “moral rights” to the work, and assigns these rights to NATA.

Journal of Athletic Training

Reprint permission for *Journal of Athletic Training* articles is granted by the *JAT* editorial office and the Copyright Clearance Center.

NATA Logo



The NATA corporate logo and AT Expo logo are trademarked and may only be used by NATA. The *NATA Graphic Standards Manual*, available from the national office, specifies usage and permission requirements for other versions of the NATA logo(s).

Position Statements

Position statements are produced by the NATA Research & Education Foundation Pronouncements Committee, and are approved by both the NATA Foundation and the NATA boards. Position statements are the intellectual property of NATA.

Competencies

NATA has licensed the use of the athletic training competencies to the Commission on Accreditation of Athletic Training Education (CAATE). Reprint rights are granted by the CAATE.

NATA-SPONSORED MEETINGS AND EVENTS

Benefits to VIPs and Volunteers Presenting or Assisting

Honorary and Retired Members

Honorary, retired associate and retired certified members receive complimentary registration to the NATA convention.

Immediate Past President

The immediate past president receives complimentary lodging for the two conventions following the completion of his/her term of office.

Presenters, Assistants and Convention Volunteers

NATA endeavors to fairly compensate individuals who present, participate or volunteer at the NATA convention and other educational meetings. NATA reimburses authorized travel and meal expense according to NATA policy. The meetings department maintains the board-approved volunteer policies. The knowledge initiatives department maintains the board-approved presenter and assistant policies. Copies are available upon request.

NATA Promotion of Commercial Events

NATA only publicizes convention events presented by NATA Strategic Partners, NATA Sponsors, Convention Sponsors and association service providers.

Convention Registration, Attendance and Exhibit Policies

Other policies relating to convention registration and attendance are stated on the NATA Advance Registration Form and the NATA Exhibit Booth Application & Contract.

MEMBERSHIP PROCEDURES

Discrimination Policy

The National Athletic Trainers' Association does not discriminate against any legally protected class.

Application for Membership

The NATA member services department processes membership applications, which must include dues payment.

The membership application requires applicants and renewing members to declare under oath and penalty of disqualification if they have been convicted of a felonious crime. Applicants and renewing members with such convictions are referred to the Committee on Professional Ethics for review and approval prior to acceptance into the association.

Proof of Membership

Members can verify their membership by accessing their online membership record.

District Affiliation

Except those who live outside the U.S. and its territories and otherwise noted here, an association member must hold district membership, which is determined by the preferred mailing address.

International members may choose to affiliate with and pay dues to any district that accepts international members.

If a member moves to another district, the member services department transfers the member to the new district. The district secretary shall be notified of the change. Any difference in dues from district changes is waived for the current membership year.

Membership Categories

Certified – Regular

An individual who holds the ATC (Athletic Trainer, Certified) credential and is in good standing with the Board of Certification, Inc.

Certified regular members in good standing may vote on association matters, hold NATA office and serve on committees, workgroups, project teams and as NATA liaisons.

Certified Retired

A former certified member with twenty years of NATA membership who has resigned certification with the BOC and resigned any form of state licensure or regulation is moved to retired status.

Retired members may vote on association matters. A retired member must agree not to practice athletic training. A retired member does not use the ATC credential, but may use AT Ret.

Retired members receive free dues and convention registration but do not receive CEUs from the NATA convention.

Certified – International

A certified individual whose residence is located outside the ten districts and is in good standing with the Board of Certification, Inc.

An individual temporarily stationed overseas with the military does not change membership categories and is not eligible for membership in the certified-international category.

Members in this category may vote on association matters and serve on committees, workgroups, project teams and as NATA liaisons.

Non-certified – International

An individual who meets the requirements for certified-international membership but is not certified.

Associate

An NATA member who is a state licensed health care professional or individual working in athletic education, research, medicine or other profession related to athletic training.

Associate members may not vote on association matters.

A certified member whose certification is no longer in good standing with the BOC is changed to associate member.

Associate Retired

A former associate member with twenty years of NATA membership who has resigned his/her state licensure. A copy of the confirmed resignation must be forwarded to NATA.

Associate retired members may not vote on association matters. Associate retired members must agree not to practice athletic training.

Associate retired members receive free dues and convention registration but do not receive Continuing Education Units (CEUs) from the NATA convention.

Certified - Student

A certified individual enrolled as full time graduate student working toward an advanced degree at an accredited college or university. A combined total of five years is allowed in this category.

A member requesting certified-student membership category must fax, email or mail proof of full-time academic enrollment (for example, Enrollment Verification Certificate or letter to the registrar) to the member services department.

Certified students may vote on association matters, hold NATA office and serve on committees, workgroups, project teams and as NATA liaisons.

Non-certified – Student

An individual enrolled as full-time undergraduate or graduate student studying athletic training in a college or university who has not fulfilled BOC requirements for certification. A combined total of eight years (undergraduate five, graduate three) is allowed in this category. At that time, the individual is transferred to associate member status.

Corporate Member

Corporate members are companies that supply and/or manufacturer athletic training materials, supplies, equipment or services.

Individuals representing corporate member companies are not eligible for district affiliation. They may not vote or hold NATA office, unless they meet the requirements of another member category that offers those privileges.

Honorary

The NATA board awards honorary membership to eligible persons who promote and show profound interest in the profession and have been recommended by the Honors and Awards Committee. An individual may be awarded NATA honorary membership by NATA.

In addition to receiving complementary convention registration, honorary members do not pay dues.

Change of Status

A member whose change in status affects his/her membership category should notify the national office. A member requesting a change to a student membership category must fax, email or mail proof of full-time academic enrollment (for example, Enrollment Verification Certificate or letter from the registrar) to the member services department.

The NATA member services department reclassifies members determined to be in the wrong class. The member, who is notified of the change and billed, is held responsible for any monies owed. If dues for the new category are less, no refund is issued.

Dues

National Dues, Dues Discount and Relief

National dues are set by the board of directors and are prorated based on the date the application is received by NATA. The membership year is January 1-December 31. NATA offers several programs to alleviate the cost of dues.

Career Starter Dues

A certified individual who has been BOC certified one year or less receives a reduction in dues for the first full billing cycle.

Shared/Green Discount

Certified and associate members sharing the same home address may obtain a discount by asking to receive one copy of the *NATA News* and the *Journal of Athletic Training* per two members.

Certified Military – Inactive

A certified member in the Reserves who submits proof of active military service may request certified military-inactive status for a maximum of two years. The member, who does not pay dues and does not receive member benefits, may resume certified membership without a break in service if no more than two full billing cycles have transpired.

Hardship

A member experiencing extraordinary financial hardship may request hardship status and pay reduced dues while maintaining full membership benefits. Reapplication must be made after one year. This option has a maximum of two billing cycles and is not publicized.

District and State Dues

District dues are set by each district and may include state dues. District dues collected by NATA are paid to the appropriate district several times a year, according to a schedule established by NATA in cooperation with the District Secretary/Treasurers Committee. District dues are not prorated.

Payment of Dues

Dues, which are non-refundable, must be paid in U.S. funds. Members may pay dues in full or in installments, with final payment made on or before February 15.

A member whose check returns twice for insufficient funds is assessed an administrative fee of \$25 in addition to the amount of the check.

Collection of BOC Fee

For members who choose the discounted BOC fee option, NATA will collect and remit the BOC recertification fee on their behalf. The fee is included in the professional development invoice. To receive the NATA member discount, the member must pay the invoice in full by April 30.

Member Renewal, Suspension and Cancellation

Membership renewals occur November 1 for the upcoming calendar year. Payment is due December 31. Members whose dues are not paid by February 15 are suspended. Suspended members may not vote on association matters or serve on committees, workgroups, project teams or as NATA liaisons. They do not receive *NATA News*, the *Journal of Athletic Training*, or have access to the members-only section of the website.

Those who do not renew their membership by September 30 are cancelled. Individuals who allow their membership to lapse must reapply for membership.

Unpaid balances, such as convention, event or other fees, will be added to the member's next dues invoice. Failure to pay the account in full will result in membership suspension.

MEMORIAL AND DONATION GUIDELINES

Memorials

NATA has established these guidelines to demonstrate concern and compassion for nationally-involved volunteers, staff and their loved ones in times of bereavement.

Highly publicized member death in the line of duty (ex. plane crash traveling to a competition). An NATA representative, preferably the district director or close-by past president, may attend the memorial service. If necessary, this will be at NATA's expense.

Upon the death of

- current board member, committee chair or nationally-active member
- current or past president, executive director, national office holder or NATA Hall of Fame member
- staff or immediate family of staff

Flowers up to \$100 inclusive or \$100 donation to specified (preferably related) cause.

Donation Requests

Because of limited resources, NATA is unable to participate in all member-related fundraising drives. For example, the NATA is not in a position to purchase game day program ads or donate to pre-game or halftime activities where our members are honored or showcased.

The board supports contributing to education, scholarship, building and sports medicine funds that honor long-time NATA members.

Board and Hall of Fame members, past and present	
Living	\$250
Memorial	\$500
Executive director and president	
Living	\$1,000
Memorial	\$5,000

Occasionally the board may decide circumstances warrant special consideration outside of these guidelines.

RECORD RETENTION POLICY

To comply with legal requirements and standard business practice, NATA policy is to dispose of and store business documents according to the schedule below.

Documents to be retained for the life of the organization:

1. Tax returns
2. Financial statements (audited)
3. General ledgers
4. Income tax filings and payment records
5. Fixed asset records
6. Legal files and documents relating to organization
7. Board of Directors Disclosure Statement and Intellectual Property Agreement
8. Minutes of board of directors meetings
9. Minutes of committee, workgroup or project team meetings.

Documents to be retained for seven years:

(After three years these should be stored offsite, with the destruction date listed on the carton)

1. Cancelled checks and bank statements
2. Bank reconciliations
3. Vendor invoices
4. Payroll records after payment
5. Personnel records (after termination)
6. Monthly un-audited financial statements
7. Contracts (after expiration date)

Documents to be retained for three years:

1. Deposit records
2. Employment applications for candidates not employed.
3. Insurance records/policies (after termination of policy)

Documents to be retained for one year:

1. Employee benefits plans (after termination of plan)

COMPLAINT PROCEDURES

Handling Complaints Regarding Misrepresentation of Certification

Complaints/allegations regarding the misuse or unauthorized use of the ATC and/or C.A.T. certification marks are to be sent to the Board of Certification ("BOC") national office, and, if appropriate, the NATA Committee on Professional Ethics (COPE).

Reporting and Investigating Wrongdoing Policy

NATA has a responsibility for the stewardship of member and employee contributions and resources. In fulfilling that responsibility, the association is committed to compliance with laws and regulations to which it is subject.

In addition to complying with the law, it is NATA's policy to promote ethical practices and ethical treatment of its members and employees. Whether known or suspected, instances of misuse of association resources or other improper activities should be reported and appropriately investigated. Members and employees have a responsibility to each other and to the organization to maintain an environment in which problems are addressed immediately, and they are therefore protected from retaliation for making such reports.

The association endorses and utilizes internal controls and operating procedures intended to detect and prevent improper activities. If those controls or procedures fail to safeguard against irregularity, or if intentional or unintentional violation of laws or regulations occur, it is the policy of the association that members and employees are encouraged to report those irregularities and violations.

NATA prohibits hiding, destroying, altering or falsifying documents to prevent their use in litigation or other official proceedings. Toward that end, the association will have and regularly review a document retention policy. Officers, members, and employees of the association are expected to adhere to this policy.

Last, the association (through its Disclosure Statement and Intellectual Property Agreement) has asked the board of directors to disclose any real, perceived, or potential conflicts of interest that relate to board duties or deliberations, and to recuse themselves when the board makes decisions affected by the conflicts. Refusal to abide by the organization's conflict of interest policy and disclosure statement may result in removal from office and a referral to the association's Committee on Professional Ethics. Employees may not engage in any activity, paid or unpaid, that conflicts, or gives the appearance of conflicting with their obligations to NATA.

The provisions of this policy statement do not negate or minimize the effect or import of the NATA's Code of Ethics, Membership Standards and Sanctions, or the NATA Employee Handbook. Individual complaints about the professional conduct of members or of employees will be handled according to those governing documents.

APPENDIX A: BOARD OF DIRECTORS DISCLOSURE STATEMENT AND INTELLECTUAL PROPERTY AGREEMENT

Disclosure Statement

Each NATA director will disclose every issue, subject, person or entity in which s/he has a financial or other interest where there is the potential that the NATA board of directors or committee may make decisions affecting the issue, subject, person or entity. To ensure accurate, up-to-date information, NATA directors will update this disclosure statement at in-person meetings of the board.

Each director will describe clearly his or her interest in each such issue, subject, person or entity on this form supplied by, and returned to, NATA's executive director. The information on this form will be reviewed by NATA's president and executive director, and shared with NATA's board of directors if relevant to the discussion at hand.

Confidential Information

Confidential information disclosed to members of the NATA board or executive staff will be treated as confidential. They may not use or disclose confidential information except as authorized by NATA, and they should make their best efforts to prevent unauthorized disclosure.

"Confidential information" includes that which is marked "Confidential" or which reasonably should be understood as expected to be kept in confidence, as well as deliberations, discussions and debates on those matters, unless the information is available through public sources.

Unauthorized disclosure of confidential information could cause irreparable harm and significant injury to NATA and its members. Upon request, any confidential information will be returned to NATA.

Intellectual Property

Work and materials developed, created or written – as a committee, workgroup, or board member, or in any other volunteer capacity for NATA – shall be deemed work-for-hire under copyright, intellectual property and other laws. NATA is granted sole and exclusive ownership of all such work. Signee waives all claims and/or so-called "moral rights" to the work, and assigns these rights to NATA.

Financial Disclosure(s)

Please indicate any relevant financial interests below, including source of income, amount and impact.

Non-financial Disclosure(s)

Specify any relevant interests of a non-financial nature here.

I have read NATA's Disclosure Statement and Intellectual Property Agreement and agree to abide by its terms.

Signature

Print Name

Date (June board meeting)

District

Policy Review and Update

I have reviewed the policy and updated my disclosures. (Please initial any changes.)

January board meeting (initial & date)

May board meeting (initial & date)

APPENDIX B: FINANCIAL AND INVESTMENT POLICIES

Financial Policies

1. **Sponsorship**
In order to run an efficient sponsorship program, the board has empowered NATA staff to negotiate sponsorship agreements. This enables staff to meet with sponsors as needed to conduct this business and to otherwise service the relationship.

It is important that our Founding Strategic Partners have the opportunity for face time with the NATA president and board of directors.
2. **Executive Sessions**
The board must be able to have open and candid dialog in order to conduct its business effectively. At times, board meetings shall include sessions without the executive director, staff, contractors or others whose presence may inhibit discussion. There may be occasions when the board requires a separate session with only the auditor, legal counsel or anyone else the board believes would be helpful to its deliberations.
3. **Board Selects Key Consultants**
The board shall select the NATA auditor, legal counsel and investment counselor. To ensure loyalty to the board, the process should be without undue influence by the executive director.
4. **Preapproval of Legal Expenses**
Use of legal counsel by board members or staff must be pre-approved by the executive director, or if that is not possible, by the president. NATA will not pay for unauthorized legal expense.
5. **Budget Complies with GAAP**
The budget shall comply with generally accepted accounting principles. A copy will be sent to the auditor at the same time the final draft is sent to the Finance Committee before the Finance Committee meeting.
6. **Distribution of Financials**
The board of directors and Finance Committee shall receive monthly financial reports.
7. **Executive Director Travel Expense**
The executive director's reimbursable travel-related expenses should be approved by the president and the Finance Committee chair and should fall within the budget approved for that purpose. Travel that requires expenditures over and above the approved budget should be pre-approved by the president and chair of the Finance Committee.
8. **Travel Expense Scrutiny**
Periodically the auditor shall review travel-related expense during the audit. This is to avoid any abuse of these expenditures and because our financial reporting format is organized by program rather than by line item.
9. **Regular Program Review**
Programs will be reviewed every third year for continued relevance and effectiveness.
10. **Three Bids**
The National Athletic Trainers' Association supports fiscally prudent management of its resources. When appropriate, three bids should be sought on projects, services and products. On some occasions — such as when the current provider is unlikely to be replaced — it may be permissible to obtain two price comparisons without going through the full request for proposal (RFP) process. Foregoing the RFP requires the executive director's approval, except in the case of the auditor, legal counsel and the investment counselor, which requires the president's approval.
11. **Policy Compliance**
As part of the annual financial audit, the auditors shall perform a limited compliance review to insure that the financial and investment policies are adhered to on a consistent basis. If any inconsistencies in the audit or violations of these policies are detected, the auditor shall discuss these items with the head of the finance

department and the executive director. If agreement cannot be reached, the auditor will issue with the audit report a management letter detailing the concerns. At any time it is determined these policies have been violated, the Finance Committee chair and president shall be notified.

12. Annual Policy Review

The financial and investment policies are kept up-to-date through annual review and discussion at the in-person Finance Committee meeting.

Investment Policy

Finance Committee Oversight

The NATA board of directors has charged the Finance Committee with overseeing association finances and investment of association funds.

Purpose of the Investment Policy

The investment policy outlines the investment objectives of the NATA fund and is intended to provide guidelines for managing the portfolio. The policy sets forth the:

1. Overall investment objectives and approach for managing fund assets.
2. Responsibilities of the investment manager.
3. Parameters for the operating and investment accounts.
4. Asset allocation mix designed to achieve the stated investment objectives.
5. Requirements for permissible securities and diversification of assets.

Investment Objectives

NATA's investment objective is to:

1. Produce attractive investment returns from income and capital appreciation consistent with a moderate level of risk.
2. Obtain the highest net rate of return given the moderate risk provision.

Responsibilities of the Investment Manager

The investment manager shall:

1. Adhere to the investment policy guidelines and rebalance the account as specified.
2. Seek to obtain the best net price and execution for the fund.
3. Provide a monthly report detailing investment actions and results, comparison to designated market indices, and report asset allocation by dollar values and percent of total portfolio to enable the committee to ascertain compliance with the asset allocation guidelines.
4. Be available to discuss these reports or other investments as needed, and to attend one Finance Committee meeting once a year if requested.
5. Assist the committee in its investment policy review by offering appropriate amendments related to changes in the market, NATA's portfolio or other pertinent conditions.
6. Monitor performance of individual equities, buying and selling as appropriate.

Operating Account

NATA shall maintain an interest-bearing operating account containing sufficient funds to cover expenses without having to access long term investments.

Investment Account

The investment account consists of long term investments.

Asset Allocation Guidelines

The asset allocation mix is the most important factor in achieving the committee's long-term investment objectives. In keeping with the stated level of moderate risk, the asset allocation mix shall be maintained as follows.

Percentage of Total Portfolio

Equities	50 – 75%
International	15% max
Convertible	10% max
Fixed Income Securities	25 – 50%
Cash	0% to 20%

Portfolio Requirements

1. Assets must be of investment grade.
2. No single equity issue shall exceed 5% of the cost value of the total equity portfolio. This does not apply to investments in equity indexed exchange traded funds (ETFs) consisting of a diversified set of securities.
3. Individual equity securities should be listed on the NYSE or NASDAQ exchanges or Over-the-Counter Bulletin Committee markets, and may consist of both U.S. and international companies.
4. Short selling, options trading, commodity futures trading or investments in derivative or other highly speculative securities are prohibited, as are restricted stock and private placements.
5. No funds will be invested in real estate, junk bonds, derivatives of non-liquid stocks or bonds that are not highly rated or do not meet association standards.
6. An individual issuer of fixed income securities, with the exception of the U.S. Government and its agencies, shall not exceed 10% of total portfolio assets.
7. Acceptable investment sectors include government and agency issues, mortgage- backed securities, asset-backed securities, corporate bonds and money market instruments.
8. Maturity of fixed income securities on average shall not exceed seven years.

Rebalancing

The portfolio should be rebalanced if necessary to meet the specified asset allocation mix. Asset allocation should be reviewed at least quarterly with the expectation that asset classes will rebalance to their guideline if the difference in actual and target range exceeds 5% and if it is prudent to do so. Other rebalancing of the account or variation from these guidelines is permissible if recommended by the investment manager and approved by the Finance Committee chair and executive director.

Investment Benchmark Indices

The policy's benchmark indices measure changes in financial markets often expressed in percentage changes from a base year, previous quarter or other comparable period. Total return on fund assets shall be compared using the following indices:

1. S&P 500
2. Russell 1000 Value & Russell 1000 Growth
3. MSCI EAFE
4. 91-Day Treasury Bills
5. Merrill Lynch 1 – 5 Year Corp/Gov't
6. Merrill Lynch US Corp/Govt 1 -10 yr.

Annual Review

The committee shall review the policy and any recommendations for amendment from the investment manager once a year to ensure the policy remains current.

APPENDIX C: GIFT ACCEPTANCE POLICY

The National Athletic Trainers' Association (NATA) solicits and accepts gifts for purposes that will help the organization further and fulfill its mission. NATA urges all prospective donors to seek the assistance of personal legal and financial advisors in matters relating to their gifts, including the resulting tax and estate planning consequences. The following policies and guidelines govern acceptance of gifts made to NATA for the benefit of any of its operations, programs or services.

Use of legal counsel

NATA will seek the advice of legal counsel in matters relating to acceptance of gifts when appropriate. Review by counsel is recommended for:

1. Gifts of securities that are subject to restrictions or buy-sell agreements.
2. Documents naming NATA as a trustee or requiring NATA to act in any fiduciary capacity.
3. Gifts requiring NATA to assume financial or other obligations.
4. Transactions with potential conflicts of interest.
5. Gifts of property which may be subject to environmental or other regulatory restrictions.

Restrictions on Gifts

NATA will not accept gifts that (a) would result in NATA violating its corporate charter, (b) would result in NATA losing its status as an IRC 501(c)(6) not-for-profit organization, (c) are too difficult or too expensive to administer in relation to their value, (d) would result in any unacceptable consequences for NATA, or (e) are for purposes outside NATA's mission. Decisions on the restrictive nature of a gift, and its acceptance or refusal, shall be made by the Finance Committee, in consultation with the Executive Director.

Gifts Generally Accepted Without Review

1. Cash. Cash gifts are acceptable in any form, including by check, money order, credit card, or on-line. Donors wishing to make a gift by credit card must provide the card type (e.g., Visa, MasterCard, American Express), card number, expiration date, and name of the card holder as it appears on the credit card.
2. Marketable Securities. Marketable securities may be transferred electronically to an account maintained at one or more brokerage firms or delivered physically with the transferor's endorsement or signed stock power (with appropriate signature guarantees) attached. All marketable securities will be sold promptly upon receipt unless otherwise directed by NATA's Finance Committee. In some cases marketable securities may be restricted, for example, by applicable securities laws or the terms of the proposed gift; in such instances the decision whether to accept the restricted securities shall be made by the Finance Committee.
3. Bequests and Beneficiary Designations under Revocable Trusts, Life Insurance Policies, Commercial Annuities and Retirement Plans. Donors are encouraged to make bequests to NATA under their wills, and to name NATA as the beneficiary under trusts, life insurance policies, commercial annuities and retirement plans.
4. Charitable Remainder Trusts. NATA will accept designation as a remainder beneficiary of charitable remainder trusts.
5. Charitable Lead Trusts. NATA will accept designation as an income beneficiary of charitable lead trusts.

Gifts Accepted Subject to Prior Review

Certain forms of gifts or donated properties may be subject to review prior to acceptance. Examples of gifts subject to prior review include, but are not limited to:

1. Tangible Personal Property. The Finance Committee shall review and determine whether to accept any gifts of tangible personal property in light of the following considerations: does the property further the organization's mission? Is the property marketable? Are there any unacceptable restrictions imposed on the property? Are there any carrying costs for the property for which the organization may be responsible? Is the title/provenance of the property clear?
2. Life Insurance. NATA will accept gifts of life insurance where NATA is named as both beneficiary and irrevocable owner of the insurance policy. The donor must agree to pay, before due, any future premium payments owing on the policy.
3. Real Estate. All gifts of real estate are subject to review by the Finance Committee. Prior to acceptance of any gift of real estate other than a personal residence, NATA shall require an initial environmental review by a qualified environmental firm. In the event that the initial review reveals a potential problem, the organization may retain a qualified environmental firm to conduct an environmental audit. Criteria for acceptance of gifts of real estate include: Is the property useful for the organization's purpose? Is the property readily marketable? Are

there covenants, conditions, restrictions, easements, encumbrances, or other limitations associated with the property? Does the environmental review or audit reflect that the property is damaged or otherwise requires remediation?