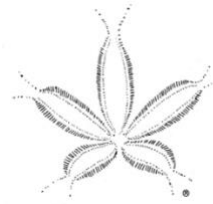


# Registered Instructor Training Program Handbook of the Society of Ortho-Bionomy International®



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## **Society of Ortho-Bionomy International Instructor Training Policy**

### **Reasons for This Policy**

Quality education is one of the highest goals and services of the Society of Ortho-Bionomy International (SOBI). Whether someone is taking Ortho-Bionomy classes for personal or professional enhancement, they deserve the opportunity to experience Ortho-Bionomy from a well-trained instructor. Instructor trainees deserve the best education possible to ensure that they present Ortho-Bionomy in ways that are both personally and professionally satisfactory and successful.

The Society of Ortho-Bionomy International has the legal and functional responsibility to ensure that all instructors receive a quality education and represent Ortho-Bionomy with the highest integrity. The Society has a particular interest in protecting usage of the trademarked term “Ortho-Bionomy.” It is imperative that the Society has appropriate supervision over the training process to guarantee continuity and quality of instruction.

Ortho-Bionomy is a highly creative and evolving form of bodywork that requires room to grow and change. Any training instructor must be open enough to stimulate and support creativity and at the same time provide a structure that focuses that creativity. Instructor training should promote individual expressions that are shared in a group and community setting. Instructor training should be open to new solutions and also be cognizant and connected to the successes of the past.

The following Instructor Training Policy attempts to meet the above challenges by creating a clear, fair, and flexible process that meets the needs of trainees, the Society, and future students of Ortho-Bionomy.

The Instructor Training Program (ITP) offers training for those who are drawn to teach Ortho-Bionomy. There are two evolution stages in the ITP: Associate Instructor and Instructor. After completing the first section of training, you (the trainee) may evolve to Associate Instructor, at which point you may teach study groups. After completing the entire ITP and evolving to a Registered Instructor of Ortho-Bionomy you will be qualified to teach Standard Phase 4 classes.

Once you are approved as a Registered Instructor you will also be eligible to teach other Phase 4 classes after meeting each class’s requirements. These classes include Posture & Post, Isometrics & Isotonics, and Exploration of Movement Patterns, among others. Please refer to [SOBI Policy Section 3](#) to view the specific requirements of each class. Most classes require a Co-Teach and approval to teach from the Supervising Instructor. Before you may teach any classes that require approval from a Supervising Instructor, the SOBI office must receive written confirmation from the Supervising Instructor of their approval for you to teach the class.

## **The Instructor Training Program**

### **Basic Requirements**

- Instructor Training Seminar Part I; 5 days, 40 hours
- Instructor Training Seminar Part II; 5 days, 40 hours
- 6-12 Observation/Bench Assists (at least 3 Bench Assists with demonstrations/presentations)
- 3-6 Co-Teaches
- 1-2 Supervised Teaches

The exact number of Observation/Bench Assists, Co-Teaches, and Supervised Teaches required for your training will be determined by your advisor(s) and ITS instructors. They may also assign other requirements to supplement your training, related to the art of teaching Ortho-Bionomy, to enhance your success as an Ortho-Bionomy instructor, e.g. public speaking, language proficiency.

All aspects of training in the ITP, from recommendations to classes, must be done with qualifying SOBI Registered Instructors to Advanced Instructors. Bench Assists and Co-Teaches may be completed with non-SOBI instructors that are in good standing with another Ortho-Bionomy organization, with advisor approval. Make sure the instructors with whom you work meet the necessary requirements detailed in each section.

### **Basic Steps**

1. Apply to the program
2. Begin training
  - Attend and complete Instructor Training Seminar (ITS) Part I
    - You may Bench Assist without demonstrations/presentations before ITS Part I, if qualified
3. Continue training
  - Complete all required Bench Assists
  - Apply to evolve to Associate Instructor
  - Evolve to Associate Instructor
  - Attend and complete Instructor Training Seminar Part II
    - You may attend ITS Part II before completing all Bench Assists and/or evolving to Associate Instructor
    - You may begin fulfilling required Co-Teaches before attending ITS Part II as long as you have already evolved to Associate Instructor
4. Finish training
  - Complete all remaining curriculum requirements, including Co-Teaches, Supervised Teaches, coursework, and any additional training
  - Apply to evolve to Instructor
  - Evolve to Instructor

## Admission Requirements

- Current member of SOBI
- Be a Registered Advanced Practitioner of Ortho-Bionomy or be enrolled in and have completed a minimum of 375 hours of the Advanced Practitioner Training Program (APTP), with clear intention to complete the APTP ideally within 6 months and no later than 1 year
- Be recommended to the Instructor Training Program by your advisor and another qualifying instructor (or 2nd advisor)
- Submit an [Instructor Training Program Application Packet](#) to the SOBI office
- Be approved by the Instructor Review Committee and SOBI Board to train

The IRC consists of three instructor members of SOBI, including at least one Advanced Instructor. The members are appointed by the Board of Directors and are rotating positions. A fourth alternate is a silent member of the committee and will review a case if a regular committee member is not available to assess a particular case. It is the role of the IRC to review paperwork and provide quality assurance of the applicants. **IRC session cycles begin on March 15, June 15, September 15, and December 15. Email completed packets by the first date of a session for your paperwork to be reviewed in that session.** Committee sessions end the day before the next committee cycle. Committees review paperwork and forward their decisions as soon as possible, but they have until the end of a session cycle to complete their findings.

If the Instructor Review Committee denies an applicant's request for entry into the Instructor Training Program, the applicant and the instructors who have recommended the applicant will be notified in writing. The applicant will have the option of reapplying to the Instructor Training Program after a 6-month period.

Prior approval by the IRC and Board for the Instructor Training Program is required before attending an Instructor Training Seminar. Trainees who take an Instructor Training Seminar without prior approval will be considered auditors and not awarded credit.

## Choosing an Advisor

An integral aspect of the Instructor Training Program is the input, guidance, support, and feedback received from an advisor. Your advisor must be a SOBI Registered Instructor—Advanced Instructor in good standing with the Society with at least two years of active teaching experience. Only one advisor is necessary; however, having two advisors is beneficial and recommended. With two advisors you are likely to receive more well-rounded training. Both advisors will work together to guide your training and formulate your specific requirements. Also, if one advisor is unavailable to work with you on certain aspects of your training you will have another advisor you can contact who is already familiar with your training.

The advisor's role in the ITP is more involved than in the Practitioner and Advanced Practitioner Training Programs. Your advisor oversees and participates in most aspects of your training. They are someone you will be working with for your entire training. It is important to take your time to find an advisor who is ready and willing to take on the philosophical, educational, and practical responsibilities of their role and who will provide you with the best guidance. Some of an advisor's responsibilities during training include:

- Reviewing a trainee's forms and submission packets
- Recommending a trainee to the program and for evolvments
- Formulating any requirements in addition to the curriculum
- Supervising some of a trainee's Bench Assists, Co-Teaches, and Supervised Teaches

Talk with the instructor of your choice to discuss expectations. Specify what you expect from an advisor and hear what they expect their role to be. When you come to an understanding that is clear for both of you, put your agreement in writing. You will have your agreement to refer back to if necessary.

### **Tips and guidelines for selecting an Advisor**

- Can the instructor clearly articulate what they require from an advisee?
- Can the instructor talk in detail about how they view their role as advisor?
- Is the instructor prepared and willing to do the practical work of an advisor, including writing evaluations and recommendations, and reviewing your submissions?
- Does the instructor respond to your communications in a timely manner?
- Do you feel you will get the time and attention you need from the instructor? Be direct and ask for what you envision.
- What are the instructor's fees for consultations? Do they have other fees?
- Does the instructor have a written contract? Not all instructors have a contract but they should be able to talk in detail about what they expect from an advisee. Talk with several instructors before choosing an advisor. This is a relationship in which you need to be supported, guided, and respected. Find an instructor who matches your needs and at the same time will challenge you to continue to grow.

You are allowed to change advisors any time during your training. If you decide to change, please inform the SOBI office by completing the [Change of Advisor Form](#) online so the office can contact the correct advisor if the need ever arises. Also, as a courtesy please let your current advisor(s) know of your decision to change. If you change advisor(s), your new advisor(s) may require you to complete additional training. If a situation arises where you and your advisor disagree about your training requirements, you may appeal to the IRC.

The freedom and flexibility of the Instructor Training Program allows you to control many aspects of your training. This also means that ultimately your training is your responsibility. It is important to remain in contact with your advisor(s) and any instructors with whom you work to stay on top of getting all required signatures and evaluations. If you completed a class and something happens to your advisor or the instructor that then prevents them from completing an evaluation/review (e.g. illness), then you will not receive credit for that class.

## Applying to the Program

Create your Instructor Training Program Application Packet. Compile completed **typed** documentation into a **single PDF in this order**:

1. [Application to Enter the Instructor Training Program](#)
2. [Advisor Recommendation to Enter the Instructor Training Program](#) from each Registered SOBI Instructor—Advanced Instructor who agrees to be your advisor and supervise your training (if you have multiple advisors, you will need to submit completed copies of this form from each of your advisors)
3. [Instructor Recommendation to Enter the Instructor Training Program](#) from a qualifying instructor who is familiar with your work as a student (this form is not necessary if you have multiple advisors who have all completed the *Advisor Recommendation to Enter the Instructor Training Program* form)
4. [Advisor Selection for the Instructor Training Program](#)
5. *Advanced Practitioner Training Program Record* showing completion of at least 375 units of the Advanced Practitioner Training Program (only required if you are not already a Registered Advanced Practitioner)
6. [Advisor Review of Instructor Training Program Application Packet](#)

Email entire Application Packet as a single PDF to [office@ortho-bionomy.org](mailto:office@ortho-bionomy.org)

Submit your Application Packet by March 15, June 15, September 15, or December 15 to be reviewed in the next IRC cycle.

See [Completing Forms and Signatures Electronically](#) for more information on getting e-signatures from instructors.

Save your completed packet and keep all the original documents for yourself. Send a copy to your advisor(s).

Pay \$100 application fee, invoiced from SOBI office after receipt of your packet.

The SOBI office sends Instructor Training Program Application Packets to the Instructor Review Committee. IRC recommendations are sent to the SOBI Board for approval. You will be notified of the status of your application to the Instructor Training Program after the next IRC meeting. Once accepted you can attend Instructor Training Seminar Part I.

## Instructor Training Seminar

The Instructor Training Seminar is where you begin your training as a future instructor of Ortho-Bionomy. ITS offers a place of support where all can learn from observing one another. It is a place to learn more about the training program, practice demos, bond with other trainees, and discuss ways to communicate with instructors about their expectations for Bench Assists and Co-Teaches. ITS also provides a space to clarify standard technique so that the foundations of the work are not lost. Many instructors demonstrate the work differently in their classes, which can create confusion for a trainee about standard technique. In this work it is important to clarify the difference between standard technique and how someone might use the technique in their practice.

Attending an approved Instructor Training Seminar is required for all students enrolled in the Instructor Training Program. A trainee cannot attend an Instructor Training Seminar until the

ITS instructors have seen the trainee's email of acceptance into the Instructor Training Program from the SOBI office.

The Instructor Training Seminar is divided into two segments, ITS Part I and ITS Part II, which are 5 days and 40 hours each. ITS Part I is a prerequisite for ITS Part II. ITS Part II may only be taken at least 6 months after attending ITS Part I. When exactly to take ITS Part II is determined in conversation with your advisor. It is recommended to complete as many required Bench Assists as possible before taking ITS Part II.

A trainee may attend either ITS Part I or ITS Part II online, but not both.

## Curriculum

Trainees are required to complete the minimum units/hours in each of the following curriculum topics. Precise units required in your training are determined by your advisor(s) and ITS instructors. Classes/hours taken beyond the suggested maximums should not be recorded on the *Instructor Training Program Record*.

These topics are important components of the educational process, preparing trainees to teach Ortho-Bionomy at the foundational level and to assume the many responsibilities of an instructor.

- **Clarification of Program, Roles and Responsibilities (4-8 units)**  
This is time to clarify the details and process of the full Instructor Training Program and review and clarify the *Instructor Training Program Record*. It also includes reviewing the guidelines and the role of the trainee in observing, bench assisting, co-teaching, and supervised teaching, and in working with instructors and advisors.
- **Demonstration of Teaching (16-48 units)**  
Demonstration of Teaching is time spent in class or in ITS doing presentations of the techniques of Ortho-Bionomy and receiving clarification and feedback from instructors.
- **Clarification of Technique (8-16 units)**  
Clarification of Technique is time spent receiving feedback and/or clarification of standard technique from an instructor. This may be in ITS, in preparation for a Bench Assist or Co-Teach, or after completing a Bench Assist or Co-Teach. Working with the approaches of your advisor or a Supervising Instructor is essential for the flow of a Bench Assist and Co-Teach.
- **Demonstration of History and Philosophy (4-6 units)**  
Demonstration of History and Philosophy consists of review, clarification, and discussion of history and philosophy resources such as the Phased Reflex Techniques paper by Pauls and Basham, the Spontaneous Release by Positioning paper by Jones, and various early articles on Ortho-Bionomy and proprioception. It also includes time spent in class or in ITS doing presentations of the history, principles, and concepts of Ortho-Bionomy and receiving feedback and clarification from instructors.



- **Classroom Dynamics (Ethics and Energy) (16-32 units)**

This topic is a blend of information, discussion, and embodied experience explored both in the classroom and in ITS training. Trainees will deepen their understanding of the ethics and dynamics of the multiple roles and relationships a teacher has both in and out of the classroom with Ortho-Bionomy students and colleagues. Examples include pacing, tracking, working with the class flow, handling challenging classroom situations, recognizing signs of build-up and overwhelm, and working with group dynamics.

- **Business of Teaching (8-16 units)**

Business of Teaching includes the non-instructional aspects of being an instructor. This can include marketing classes, creating ad copy and descriptions of classes, writing a bio, engaging with potential students, finding a coordinator and creating coordinator agreements/contracts, finding a venue, tracking payments, having a refund policy stated on your advertising material, keeping class rosters, feedback forms, and emailing a spreadsheet roster to the office.

- **Observation and Discussion of a Class (20-32 units)**

This includes time in class when you are not presenting or assisting at tables. The focus is to observe the Instructor's demonstrations, taking notes on how you might do it differently in your practice, so these differences can be discussed later with the instructor and your advisor(s). Trainees are encouraged to observe entire classes, noting the flow and pacing of the class, the mood and tone set by the instructor, and relationship dynamics within the class. Learning the skill of observation is an important part of learning to observe and track students when you are an instructor.

- **Feedback and Demonstration Practice (6-48 units)**

This is spent time with instructors to work on any aspect of training. It may include feedback, discussion, and/or evaluation of how things went in a Bench Assist, Co-Teach, or Supervised Teach, or practicing demonstrations/presentations.

- **Recognize How Students Learn Ortho-Bionomy (16 units)**

This segment of the program explores the art of effective teaching: clarity and simplicity of standard Phase 4 demonstrations with clear, crisp recaps; focused observation of student practice, including hand placement, quality of contact, tracking how to fine-tune the position to the point, appropriate compression and rebound; and body mechanics. Discussion includes how to give level-appropriate feedback during practice time and in feedback sessions. We will also reflect on what helps you learn and continue to evolve your understanding of Ortho-Bionomy as a segue to reflect on what may help other students learn and evolve their own understanding. Documented time for this section may include a written paper, discussion in ITS, and/or discussion with class instructors or your advisor(s).

- **How to Advise Students (4-8 units)**

This topic covers the roles and responsibilities of advising students. We will discuss details of this role including the relationship between advisor and advisee; the art of giving feedback; the responsibilities for consultations, feedback, and evaluation sessions; how to track paperwork and the student's relationship with their training program; and how to support students as they progress in their training.

- **Society's Policies and Ethical Relationships (4-6 units)**

This topic demonstrates how to introduce the Society, membership, trademark policy, and the Associate and Practitioner Training Programs. It includes discussion of your evolving role and relationship within the Ortho-Bionomy community, in-class and professional etiquette, and your potential role as an advisor. It covers essential information instructors must know about SOBI's policies, as well as further discussion about ethically navigating the power dynamic of instructor/student or advisor/advisee.

Which of the required topics and time allocated to a topic in an ITS are determined by that specific ITS's instructors. Any required topics and related hours not covered in ITS need to be completed in another form. This can be done in consultations, which are one-on-one or group time spent with your advisor or a registered instructor that augment or supplement your training outside of ITS, or during Bench Assists, Co-Teaches, and Supervised Teaches. For example, you may complete some of the required hours in Demonstration of Teaching by demonstrating Ortho-Bionomy techniques in a Bench Assist, Co-Teach, or Supervised Teach. You will work with your advisor(s) to properly fulfill and document your required curriculum hours.

## **Associate Instructor Portion of the Program**

The requirements to evolve to Associate Instructor include completing all Observations/Bench Assists.

### **Observation/Bench Assists (6-12 classes)**

An Observation/Bench Assist can consist of observing a class, assisting students during practice time and, if permitted by the instructor, demonstrating/presenting techniques.

Six to twelve Observations/Bench Assists are required for training. At least three Bench Assists must include demonstrations/presentations. The exact number of Observations/Bench Assists and Bench Assists with demonstrations/presentations required will be determined by your advisor(s) and ITS instructors. Multiple non-credit observations of classes are strongly recommended for all trainees. It is also recommended that each class you Bench Assist have at least 4 students in attendance.

All Bench Assists must be done with SOBI Registered Instructors through Advanced Instructors. With your advisor's approval you may complete Bench Assists with non-SOBI Instructors through Advanced Instructors that are in good standing with another Ortho-Bionomy organization. All instructors must have least one year of active teaching experience. A trainee may do observation-only Bench Assists with a new instructor who has not yet met the 1-year requirement, with advisor approval. Throughout your Bench Assists and Co-Teaches, you must work with a minimum of two instructors.

All Observations/Bench Assists must be Phase 4 classes of at least 16 units. Class days do not need to be consecutive. At least 5 Observation/Bench Assists must be Standard Phase 4 classes. For remaining Observation/Bench Assists a trainee and their advisor will determine appropriate Phase 4 classes. See the Glossary of Terms for a complete list of classes.

A maximum of two Bench Assists may be done online for credit. Exceptions could be made to include more online Bench Assists with advisor approval.

Practitioners who have completed at least 375 units of the Advanced Practitioner Training Program may only receive credit for one Observation/Bench Assist before completing ITS Part I. Advanced Practitioners may complete multiple Observations/Bench Assists for credit before completing ITS Part I. A minimum of five Bench Assists must be completed after ITS Part I for all trainees. Bench Assists may not include demonstrations/presentations until after completing ITS Part I.

*Note: For those who were enrolled in the ITP before these guidelines were issued, the limit of one Bench Assist for credit before ITS may not apply. In such a case, the trainee's advisor and ITS instructors will set the number of Bench Assists required.*

Bench Assists that meet all previous guidelines and were completed before entering the Instructor Training Program may count for credit with advisor approval.

**Evaluation forms** ([Trainee Observation/Bench Assist Self-Evaluation](#) and [Instructor Evaluation of Trainee](#)) for **each** Observation/Bench Assist need to be completed after each class. These forms should demonstrate the learning and progress that is on-going in training so that they provide clear information for the IRC.

## Requirements to Evolve to Associate Instructor

It is the advisor's responsibility to review and confirm that the Instructor Training Program's requirements have been met before recommending the trainee evolve to Associate Instructor.

- SOBI membership is current
- The trainee is a Registered Advanced Practitioner
- The trainee has completed ITS Part I
- The trainee has completed all Bench Assists required by their advisor and ITS trainers. A minimum of 3 Bench Assists must have included classroom demonstrations/presentations.
- The trainee must be recommended to become an Associate Instructor by their advisor and another qualifying instructor (or 2<sup>nd</sup> advisor), who have both experienced the trainee's work in the classroom, including demonstrations/presentations.
- The trainee must submit their complete Associate Instructor Evolvment Packet to the SOBI office.
- Evolvment packets are reviewed by the IRC quarterly. The IRC then sends their recommendation to the Board for approval. The SOBI office will notify the trainee and their advisor(s) of the trainee's appointment as an Associate Instructor or of any requirements for further training.
- Once approved, Associate Instructors may teach study groups and begin Co-Teaching. A trainee may not teach study groups or Co-Teach before evolving to Associate Instructor.

## Directions to Evolve to Associate Instructor

Create your Associate Instructor Evolvment Packet. Compile completed **typed** documentation into a **single PDF in this order**:

1. [Request for Evolvment to Associate Instructor](#)
2. [Instructor Training Program Agreement—Instructor Training Seminar Part I](#), completed at ITS Part I
3. [Advisor Recommendation for Evolvment to Associate Instructor](#) from your advisor. Your advisor must have experienced your work in the classroom including demonstrations/presentations (if you have more than one advisor, each advisor will need to complete this form).
4. [Instructor Recommendation for Evolvment to Associate Instructor](#) from a qualifying instructor who has experienced your work in the classroom including demonstrations/presentations (this form is not necessary if you have a second advisor who has completed the *Advisor Recommendation for Evolvment to Associate Instructor* form)
5. Observation/Bench Assisting portion of the [Instructor Training Program Record](#) (pages 1-9)
6. [Trainee Observation/Bench Assist Self-Evaluation](#) **AND** [Instructor Evaluation of Trainee](#) for all Observation/Bench Assists. Each self-evaluation for a class should be immediately followed by the instructor evaluation for that class, in chronological order by class date.
7. [Advisor Review of Associate Instructor Evolvment Packet](#)

Email complete Associate Instructor Evolvment Packet as a single PDF to [office@ortho-bionomy.org](mailto:office@ortho-bionomy.org)

See Completing Forms and Signatures Electronically for more information on getting e-signatures from instructors.

Save your completed packet and keep all the original documents for yourself. Send a copy to your advisor(s).

Pay \$150 evolvment fee—invoiced from SOBI office after receipt of your packet. This fee includes evolvment to both Associate Instructor and Instructor.

## Continuing Education for Associate Instructors

One of the following, due every two years:

- Attend 16 units of Ortho-Bionomy class
- Attend full SOBI conference

Submit CEUs by emailing a copy of class or conference certificates to the SOBI office.

Membership dues need to be paid annually (invoiced from SOBI office) to maintain active status as a SOBI Registered Associate Instructor.

## Instructor Portion of the Program

To evolve to Instructor trainees are required to complete Co-Teaches and Supervised Teaches in addition to the curriculum requirements and any additional required training.

### Co-Teaches (3-6 classes)

A Co-Teach consists of teaching an Ortho-Bionomy class with a qualifying instructor where the trainee is responsible for at least half of all aspects of teaching the class. Before co-teaching any classes a trainee must complete all of their Observations/Bench Assists, complete ITS Part I, submit their Associate Instructor Evolvment Packet and be approved as an Associate Instructor.

All Co-Teaches must be done with SOBI Registered Instructors through Advanced Instructors. With your advisor's approval you may complete Co-Teaches with non-SOBI Instructors through Advanced Instructors that are in good standing with another Ortho-Bionomy organization. All instructors must have least two years of active teaching experience. Throughout your Bench Assists and Co-Teaches, you must work with a minimum of two instructors. It is recommended that each class you Co-Teach have at least 4 students in attendance.

A trainee must Bench Assist a class before co-teaching that same class. If a trainee Bench Assists a specific class with one instructor and would like to Co-Teach that class with another instructor, the second instructor may require the trainee to first Bench Assist the class with them prior to co-teaching.

Three to six Co-Teaches are required for training. The exact number of Co-Teaches required will be determined by a trainee's advisor(s) and ITS instructors.

All Co-Teaches must be Phase 4 classes of at least 16 units. At least three Co-Teaches must be Standard Phase 4 classes. For any remaining required Co-Teaches a trainee and their advisor will determine appropriate Phase 4 classes. See the [Glossary of Terms](#) a complete list of classes.

A maximum of one Co-Teach may be done online.

Two trainees may not Co-Teach during the same class. A trainee may not Co-Teach a Residential.

**Evaluation forms** ([Trainee Co-Teach Self-Evaluation](#) and [Instructor Evaluation of Trainee](#)) for **each** Co-Teach need to be completed after each class. These forms should demonstrate the learning and progress that is on-going in training so that they provide clear information to the IRC.

### Supervised Teaches (1-2 classes)

A Supervised Teach is an Ortho-Bionomy class presented by the trainee and supervised by a qualifying instructor. During a Supervised Teach, a trainee is responsible for every aspect of the class.

Before supervised teaching a trainee must complete all of their Co-Teaches.

One to two Supervised Teaches are required for training. The exact number of Supervised Teaches required is determined by a trainee's advisor(s) and ITS instructors. Supervised Teaches must be Standard Phase 4 classes of at least 16 units. For a list of Standard Phase 4 classes see the [Glossary of Terms](#).

All supervised teaching must be done with SOBI Registered Instructors through Advanced Instructors who have at least two years of active teaching experience. Any publicity for a Supervised Teach must clearly identify the class as a Supervised Teach and must specify the Supervising Instructor who will be present. It is recommended completing Supervised Teaches with either your advisor or someone with whom you have benched, co-taught, or has other experience of your work. It's difficult for an instructor to get a good feel for your work if their first experience of your teaching is your Supervised Teach. It is also recommended that each class you Supervise Teach have at least 4 students in attendance.

During a Supervised Teach the Supervising Instructor will be observing a trainee's teaching and evaluating a trainee's performance for recommendation to become an Instructor, or to undertake additional Supervised Teaches.

Supervised Teaches must be completed in person. Online Supervised Teaches may be allowed as exceptions. Circumstances must exist that necessitate an online Supervised Teach and it must be pre-approved by both the Instructor Review Committee and your advisor(s) before occurring. In an online Supervised Teach the trainee and students must be in-person while the Supervising Instructor must attend live online. The Supervising Instructor must also have previously experienced the trainee's work in the classroom including demonstrations/presentations.

**Evaluation forms** ([Trainee Supervised Teach Self-Evaluation](#) and [Instructor Evaluation of Trainee](#)) for **each** Supervised Teach need to be completed after each class. These forms should demonstrate the learning and progress that is on-going in training so that they provide clear information to the IRC.

### **Requirements for Final Evolvment to Instructor**

It is the advisor's responsibility to review and confirm that the Instructor Training Program's requirements have been met before recommending the trainee evolve to Instructor.

- SOBI membership is current
- The trainee is a Registered Associate Instructor.
- The trainee has completed ITS Part II.
- The trainee has completed the entire Instructor Training Program Record.
- The trainee has completed all Co-Teaches and Supervised Teaches required by their advisor and ITS instructors.
- The trainee must be recommended to become an Instructor by their advisor and another qualifying instructor (or 2nd advisor) who have both experienced the trainee's work in the classroom including demonstrations/presentations, typically as a Co-Teach or Supervised Teach.
- The trainee must submit their complete Instructor Evolvment Packet to the SOBI office.

- Evolvment packets are reviewed by the IRC quarterly. The IRC will verify the completeness of the file and conduct a qualitative examination of the records. It will review the recommendations, evaluations of the trainee, the trainee's self-evaluations, and other parts of the application and records to indicate the readiness of the candidate to become an Instructor. On occasion, the IRC may also request and consider collateral information from instructors who have worked with or taught the candidate that may be relevant in making a decision. The IRC will recommend appointment of the applicant as an Instructor or suggest additional requirements for the candidate to the Board of Directors.
- Final appointment to Instructor will be made by the SOBI Board of Directors upon recommendation by the IRC.
- Trainees must have their evolvment approved before teaching any classes as an Instructor. Trainees may continue to teach study groups, which they are approved to teach as an Associate Instructor.
- It is recommended that all new Instructors send a letter of self-introduction to the entire instructor community announcing their evolvment as an Instructor.

### Directions to Evolve to Instructor

Create your Instructor Evolvment Packet. Compile completed **typed** documentation into a **single PDF in this order**:

1. [Request for Evolvment to Instructor](#)
2. [Instructor Training Program Agreement—Instructor Training Seminar Part I](#), completed at ITS Part I
3. [Instructor Training Program Agreement—Instructor Training Seminar Part II](#), completed at ITS Part II
4. [Advisor Recommendation for Evolvment to Instructor](#) from your advisor. Your advisor must have experienced your work in the classroom including demonstrations/presentations, typically as a Co-Teach or Supervised Teach. If you have more than one advisor, each advisor will need to complete this form.
5. [Instructor Recommendation for Evolvment to Instructor](#) from a qualifying instructor who has experienced your work in the classroom including demonstrations/presentations, typically as a Co-Teach or Supervised Teach. This form is not necessary if you have two advisors who have both completed the *Advisor Recommendation for Evolvment to Instructor* form.
6. Entire [Instructor Training Program Record](#)
7. [Trainee Observation/Bench Assist Self-Evaluation](#) **AND** [Instructor Evaluation of Trainee](#) for all Observation/Bench Assists. Each self-evaluation for a class should be immediately followed by the instructor evaluation for that class, in chronological order by class date.
8. [Trainee Co-Teach Self-Evaluation](#) **AND** [Instructor Evaluation of Trainee](#) for all Co-Teaches. Each self-evaluation for a class should be immediately followed by the instructor evaluation for that class, in chronological order by class date.
9. [Trainee Supervised Teach Self-Evaluation](#) **AND** [Instructor Evaluation of Trainee](#) for all Supervised Teaches. Each self-evaluation for a class should be immediately followed by the instructor evaluation for that class, in chronological order by class date.
10. [Advisor Review of Instructor Evolvment Packet](#)



Email complete Instructor Evolvment Packet **as a single PDF** to [office@ortho-bionomy.org](mailto:office@ortho-bionomy.org)  
See [Completing Forms and Signatures Electronically](#) for more information on getting e-signatures from instructors.

Save your completed packet and keep all the original documents for yourself. Send a copy to your advisor(s).

### **Continuing Education for Instructors**

One of the following, due every two years:

- Attend 16 units of Ortho-Bionomy class
- Teach half a class with a SOBI Registered Instructor—Advanced Instructor and be responsible for half of the material
- Be observed teaching by a SOBI Registered Instructor—Advanced Instructor
- Attend full SOBI Conference and Instructor Retreat

Submit CEUs by emailing a copy of class or conference certificates to the SOBI office.

Membership dues need to be paid annually (invoiced from SOBI office) to maintain active status as a SOBI Registered Instructor.



## **Completing Forms and Signatures Electronically**

### **Filling Out Forms**

All forms can be filled electronically and are available as both PDFs and Word documents. To fill out a form click on the required field and begin typing. You can also mark any checkboxes by clicking them. If the PDF reader program you are using does not support electronic fields and signatures you can download Adobe PDF Reader for free at <https://get.adobe.com/reader/> Mac computers come pre-installed with Apple's Preview application, which supports fields and signatures. The fillable Word forms require Microsoft Word. Do not use Google Docs or a similar service to convert the PDF forms into Word documents. This process distorts the formatting and such documents will not be accepted. Filling out forms electronically greatly aids the review process.

### **Signatures**

All required signatures can be completed electronically. Follow the directions below to sign any form. If you prefer you may print out forms to gather signatures then scan them back into a PDF file.

#### **Signing a Form in Adobe Reader**

1. Click "Sign" in the toolbar
2. Click "Add Signature"
3. Type or Draw your signature
4. Click "Apply"
5. Select the signature you just created
6. Place it in the appropriate signature field
7. "Save" the document

#### **Signing a Form in Mac Preview**

1. Click "View" then select "Show Markup Toolbar"
2. Click the sign icon. It looks like a tiny signature.
3. Follow the directions to create your signature
4. Click on the signature you created
5. Place the signature in the appropriate signature field

### **Requesting E-Signatures from Instructors**

Instead of printing out your forms and having an advisor or instructor manually sign them you may request e-signatures. Before emailing an instructor a document to sign first confirm that they are willing and able to sign the form electronically. If the instructor agrees, email them the form. Once they email it back to you make sure to save the new form and discard the version that does not have their signature. It is recommended to keep all your forms in one location dedicated to your training.

### **Submitting a Packet with E-Signatures**

Any packet submissions need to be complete, follow the required order of forms, and submitted as a single PDF. Both Mac Preview and paid versions of Adobe Acrobat allow you to combine multiple PDFs into one document and reorder the pages. If you do not have access to a program that has this capability, your local copy store can usually do it for you. As a final option the SOBI office can combine your forms into a single PDF for a fee of \$25 per packet. [Contact the SOBI office](#) for more information.

**Completing Forms and Signatures Physically****Electronically Submitting a Packet from Printed Forms**

If you printed out your forms to manually fill, many apps on smart phones can use the phone's camera to take pictures of documents and convert and compile them into a PDF. Search the Apple Store or Google Play Store on your phone for "pdf scanner" to find an app. Then follow the directions in the app to scan each of your physical forms and convert them to a PDF.

## **Overview and Links to All Forms**

All forms are linked below. They are also on the [SOBI website](#) under *Ortho-Bionomy Training—Training Programs—Instructor Training Program*

Each form is downloadable as either a fillable PDF (requires a PDF reader program, such as Adobe or Mac Preview) or a fillable Word document (requires Microsoft Word). If you choose to print out your forms to bring to class download the PDF versions. Do not use Google Docs or similar programs to fill out your forms as they distort the formatting.

The forms are grouped by packet submission. Several forms are linked in two places since they are submitted as part of more than one packet, such as the *Instructor Training Program Record*, but they are not different forms.

## **Instructor Training Program Application Packet Forms**

### ***Application to Enter the Instructor Training Program***

[PDF](#) [Word](#)

This is the application form to enter the Instructor Training Program. Before attending ITS Part I the completed application must be reviewed by the IRC and approved by the Board. This form is submitted as part of the Instructor Training Program Application Packet.

### ***Advisor Recommendation to Enter the Instructor Training Program***

[PDF](#) [Word](#)

This form is completed by a Registered Instructor—Advanced Instructor of Ortho-Bionomy who will serve as the applicant's advisor during training, recommending the applicant to the Instructor Training Program. If an applicant has more than one advisor, each advisor needs to complete this form. This form is submitted as part of the Instructor Training Program Application Packet.

### ***Instructor Recommendation to Enter the Instructor Training Program***

[PDF](#) [Word](#)

This form is completed by a Registered Instructor—Advanced Instructor of Ortho-Bionomy recommending the applicant to the Instructor Training Program. This form is submitted as part of the Instructor Training Program Application Packet. This form is not necessary if an applicant has multiple advisors who each completed the *Advisor Recommendation to Enter the Instructor Training Program* form.

### ***Advisor Selection for the Instructor Training Program***

[PDF](#) [Word](#)

This form confirms the trainee's advisor(s). All of your advisors should sign this form. Only one advisor is necessary; however, a trainee may wish to work with more than one instructor and may therefore have more than one advisor. Your advisor must be a registered Instructor to Advanced Instructor with a minimum of two years of active teaching experience. This form is submitted as part of the Instructor Training Program Application Packet.

**Advisor Review of Instructor Training Program Application Packet**[PDF](#) [Word](#)

This form is completed by your advisor and confirms they have reviewed your Application Packet and that all materials are present and complete. This form is submitted as part of the Instructor Training Program Application Packet.

**Associate Instructor Evolvement Packet Forms*****Request for Evolvement to Associate Instructor***[PDF](#) [Word](#)

This completed form should be submitted as the first page of the Associate Instructor Evolvement Packet once a trainee has completed ITS Part I, all their required Bench Assists, and any other requirements necessary to evolve to Associate Instructor.

***Instructor Training Program Agreement—Instructor Training Seminar Part I***[PDF](#) [Word](#)

This form is completed in conjunction with ITS instructors at the end of ITS Part I and must be reviewed by the trainee's advisor(s). If the advisor(s) is/are not ITS instructors, then the trainee must schedule a discussion with their advisor(s) as soon as possible after ITS Part I. This form is submitted as part of the Associate Instructor Evolvement Packet *and* as part of the Instructor Evolvement Packet.

***Advisor Recommendation for Evolvement to Associate Instructor***[PDF](#) [Word](#)

This form is completed by a trainee's advisor recommending the trainee's evolvement to Associate Instructor. If a trainee has more than one advisor, each advisor needs to complete this form. The recommending advisor(s) must have experienced the trainee's work in the classroom including demonstrations/presentations. This form is submitted as part of the Associate Instructor Evolvement Packet.

***Instructor Recommendation for Evolvement to Associate Instructor***[PDF](#) [Word](#)

This form is completed by a qualifying Instructor—Advanced Instructor of Ortho-Bionomy recommending the trainee's evolvement to Associate Instructor. The recommending instructor must have experienced the trainee's work in the classroom including demonstrations/presentations. This form is submitted as part of the Associate Instructor Evolvement Packet. This form is not necessary if the trainee has a second advisor who has completed the *Advisor Recommendation for Evolvement to Associate Instructor* form.

***Instructor Training Program Record***[PDF](#) [Word](#)

All your training is recorded on this form, including credit hours from ITS Part I and Part II, consultations, and class experiences. The completed Observation/Bench Assisting portion of this form (pages 1-9) is submitted as part of the Associate Instructor Evolvement Packet. The entire completed form is submitted as part of the Instructor Evolvement Packet.

***Trainee Observation/Bench Assist Self-Evaluation***[PDF](#) [Word](#)

This form is completed by the **trainee** for each Observation/Bench Assist. Every class will need its own copy of the form and should be completed directly after the class.

***Instructor Evaluation of Trainee***[PDF](#) [Word](#)

Provide a copy of this form to the **Supervising Instructor** to complete for each Observation/Bench Assist, Co-Teach, and Supervised Teach. Every class will need its own copy of the form. Most Supervising Instructors will request to see your completed self-evaluation of the class before completing their evaluation form.

***Advisor Review of Associate Instructor Evolvment Packet***[PDF](#) [Word](#)

This form is completed by your advisor and confirms they have reviewed your Associate Instructor Evolvment Packet and that all materials are present and complete. It is submitted as part of the Associate Instructor Evolvment Packet.

**Instructor Evolvment Packet Forms*****Request for Evolvment to Instructor***[PDF](#) [Word](#)

This form should be submitted as the first page of the Instructor Evolvment Packet once a trainee has completed ITS Part I and Part II and all other requirements necessary to evolve to Instructor.

***Instructor Training Program Agreement—Instructor Training Seminar Part I***[PDF](#) [Word](#)

This form is completed in conjunction with ITS instructors at the end of ITS Part I and must be reviewed by the trainee's advisor(s). If the advisor(s) is/are not ITS instructors, then the trainee must schedule a discussion with their advisor(s) as soon as possible after ITS Part I. This form is submitted as part of the Associate Instructor Evolvment Packet *and* as part of the Instructor Evolvment Packet.

***Instructor Training Program Agreement—Instructor Training Seminar Part II***[PDF](#) [Word](#)

This form is completed in conjunction with ITS instructors at the end of ITS Part II and must be reviewed by the trainee's advisor(s). If the advisor(s) is/are not ITS instructors, then the trainee must schedule a discussion with the advisor(s) as soon as possible after ITS Part II. This form is submitted as part of the Instructor Evolvment Packet.

***Advisor Recommendation for Evolvment to Instructor***[PDF](#) [Word](#)

This form is completed by a trainee's advisor recommending the trainee's evolvment to Instructor. If a trainee has more than one advisor, each advisor needs to complete this form. The recommending advisor(s) must have experienced the trainee's work in the classroom including demonstrations/presentations, typically as a Co-Teach or Supervised Teach. This form is submitted as part of the Instructor Evolvment Packet.

### ***Instructor Recommendation for Evolvement to Instructor***

[PDF](#) [Word](#)

This form is completed by a qualifying Instructor—Advanced Instructor of Ortho-Bionomy recommending the trainee’s evolvement to Instructor. The recommending instructor must have experienced the trainee’s work in the classroom including demonstrations/presentations, typically as a Co-Teach or Supervised Teach. This form is submitted as part of the Instructor Evolvement Packet. This form is not necessary if the trainee has a second advisor who has completed the *Advisor Recommendation for Evolvement to Instructor* form.

### ***Instructor Training Program Record***

[PDF](#) [Word](#)

All your training is recorded on this form, including credit hours from ITS Part I and Part II, consultations, and class experiences. The completed Observation/Bench Assisting portion of this form (pages 1-8) is submitted as part of the Associate Instructor Evolvement Packet. The entire completed form is submitted as part of the Instructor Evolvement Packet.

### ***Trainee Observation/Bench Assist Self-Evaluation***

[PDF](#) [Word](#)

This form is completed by the **trainee** for each Observation/Bench Assist. Every class will need its own copy of the form and should be completed directly after the class.

### ***Trainee Co-Teach Self-Evaluation***

[PDF](#) [Word](#)

This form is completed by the **trainee** for each Co-Teach. Every class will need its own copy of the form and should be completed directly after the class.

### ***Trainee Supervised Teach Self-Evaluation***

[PDF](#) [Word](#)

This form is completed by the **trainee** for each Supervised Teach. Every class will need its own copy of the form and should be completed directly after the class.

### ***Instructor Evaluation of Trainee***

[PDF](#) [Word](#)

Provide a copy of this form to the **Supervising Instructor** to complete for each Observation/Bench Assist, Co-Teach, and Supervised Teach. Every class will need its own copy of the form and should be completed directly after the class. Supervising Instructors will generally request to see your completed self-evaluation of a class before completing their evaluation form.

### ***Advisor Review of Instructor Evolvement Packet***

[PDF](#) [Word](#)

This form is completed by your advisor and confirms they have reviewed your Instructor Evolvement Packet and that all materials are present and complete. It is submitted as part of the Instructor Evolvement Packet.



## **Links to SOBI Policy**

### **Complete SOBI Policy**

Policy by Section

[Section 1: Organizational, Board, and International Policy](#)

[Section 2: Student, Associate, Practitioner, and Advanced Practitioner—Membership and Training Policy](#)

[Section 3: Instructor-Advanced Instructor Membership and Training Policy](#)

[Section 4: Trademark Policy](#)

[Section 5: Online Class Policy](#)

[Section 6: Addendum](#)

## **Instructor Training Program Application and Evolvment Reference**

The following pages contain summaries of applying to training, evolving, checklists, fees, and more. Please use these pages as support.

<b>Program</b>	<b>What to Submit</b>	<b>How to Submit</b>	<b>Fee*</b>
<b>Instructor Training Program</b>	Application Packet	Email complete packet as a single PDF to <a href="mailto:office@ortho-bionomy.org">office@ortho-bionomy.org</a>	\$100
<b>Associate Instructor Evolvment</b>	Associate Instructor Evolvment Packet	Email complete packet as a single PDF to <a href="mailto:office@ortho-bionomy.org">office@ortho-bionomy.org</a>	\$150
<b>Instructor Evolvment</b>	Instructor Evolvment Packet	Email complete packet as a single PDF to <a href="mailto:office@ortho-bionomy.org">office@ortho-bionomy.org</a>	None

\*Fees are invoiced from the SOBI office after receipt of your submission materials

## **Instructor Training Program Application and Evolvments**

- Printed Forms—Copy of complete packet electronically scanned as a single PDF, with all forms typed and in the required order. Review the PDF to make sure all pages came through the scan in their entirety and are legible.
- Electronic Forms—All forms combined as a single PDF in the required order.

Note: If you do not have ability to create or email PDFs from your home, many libraries, office supply stores, and copy centers can scan, create, and email PDFs for you. Also, many apps on smart phones can use the phone's camera to take pictures of documents and convert and compile them into a PDF. Search the Apple Store or Google Play Store on your phone for "pdf scanner" to find an app.

## **Advisors' Support Crucial for Applicants**

Please confirm the applicant's Instructor Training Program Application Packet includes the *Application to Enter the Instructor Training Program* as the first pages and evolvment packets



include the appropriate evolvement request form as the first page. Make sure the forms clearly and legibly state's the applicant's name (as they would like it to appear on their certificate), email, and phone number as well as the advisor's name, email, and phone number. This info speeds up the process if the committee or staff have a question on a packet. Help the trainee confirm that their packet is complete.

### **Instructor Training Program Application Packet Checklist**

All forms completed and included in this order **as a single PDF**:

- ☐ *Application to Enter the Instructor Training Program*
- ☐ *Advisor Recommendation to Enter the Instructor Training Program* from a Registered SOBI Instructor—Advanced Instructor who agrees to be your advisor and supervise your training
- ☐ *Instructor Recommendation to Enter the Instructor Training Program* from a qualifying instructor (or 2<sup>nd</sup> advisor) who is familiar with your work as a student
- ☐ *Advisor Selection for the Instructor Training Program*

**If you are not already a Registered Advanced Practitioner, also include:**

- ☐ *Advanced Practitioner Training Program Record* showing completion of at least 375 units of the Advanced Practitioner Training Program
- ☐ *Advisor Review of Instructor Training Program Application Packet*

### **Associate Instructor Evolvement Packet Checklist**

All forms completed and included in this order **as a single PDF**:

- ☐ *Request for Evolvement to Associate Instructor*
- ☐ *Instructor Training Program Agreement—Instructor Training Seminar Part I*
- ☐ *Advisor Recommendation for Evolvement to Associate Instructor* from your advisor who has experienced your work in the classroom including demonstrations/presentations
- ☐ *Instructor Recommendation for Evolvement to Associate Instructor* from a qualifying instructor (or 2<sup>nd</sup> advisor) who has experienced your work in the classroom including demonstrations/presentations
- ☐ Bench Assisting portion of *Instructor Training Program Record* (pages 1-8)
- ☐ *Trainee Bench Assist Self-Evaluation* for all Observation/Bench Assists **AND** *Instructor Evaluation of Trainee* for all Bench Assists, in chronological order by class date
- ☐ *Advisor Review of Associate Instructor Evolvement Packet*

## Instructor Evolvement Packet Checklist

All forms completed and included in this order **as a single PDF**:

- ☐ *Request for Evolvement to Instructor*
- ☐ *Instructor Training Program Agreement—Instructor Training Seminar Part I*
- ☐ *Instructor Training Program Agreement—Instructor Training Seminar Part II*
- ☐ *Advisor Recommendation for Evolvement to Instructor* from your advisor who has experienced your work in the classroom including demonstrations/presentations, typically as a Co-Teach or Supervised Teach
- ☐ *Instructor Recommendation for Evolvement to Instructor* from a qualifying instructor (or 2<sup>nd</sup> advisor) who has experienced your work in the classroom including demonstrations/presentations, typically as a Co-Teach or Supervised Teach
- ☐ *Entire Instructor Training Program Record*
- ☐ *Trainee Bench Assist Self-Evaluation* for all Observation/Bench Assists **AND** *Instructor Evaluation of Trainee* for all Bench Assists, in chronological order by class date
- ☐ *Trainee Co-Teach Self-Evaluation* **AND** *Instructor Evaluation of Trainee* for all Co-Teaches, in chronological order by class date
- ☐ *Trainee Supervised Teach Self-Evaluation* **AND** *Instructor Evaluation of Trainee* for all Supervised Teaches, in chronological order by class date
- ☐ *Advisor Review of Instructor Evolvement Packet*

## Glossary of Terms

- *Active teaching*—Minimum of three classes taught per year
- *In good standing*—SOBI member, dues paid, no grievances, signed Trademark and Code of Ethics agreements on file; instructor members must also have signed Instructor/Board agreement on file
- *Qualifying instructor*—a Registered Instructor—Advanced Instructor who is or was a member of SOBI in good standing at the time of a recommendation; a non-SOBI Instructor—Advanced Instructor who is or was a member in good standing of another Ortho-Bionomy organization may be a qualifying instructor for Bench Assists and Co-Teaches
- *Phase 4 Classes*: Standard Phase 4, Postural Re-Education & Post Techniques, Isometrics & Isotonics, Exploration of Movement Patterns, Ortho-Bionomy Self-Care, In-Depth Phase 4, and Non-Standard Phase 4
- *Standard Phase 4*—Phase 4 techniques for the major structures of the body. Each instructor is responsible to know Standard Phase 4 techniques. Phase 4 Spine, Phase 4 Extremities, and Phase 4 Whole Body are Standard classes. Titles of Standard Phase 4 classes may differ and content may have some minor variation, but are essentially the same in any registered Ortho-Bionomy instructor classroom. Standard Phase 4 classes may include cervical, thoracic, and lumbar spine; ribs; psoas; ilium; sacrum; femur; knee; ankle; foot; shoulder; elbow; wrist; and hand.

- *Supervising Instructor*—The instructor who supervises a Bench Assist, Co-Teach, or Supervised Teach
- *Unit*—1 class unit is 1 hour (class units do not include lunches or homework but may include breaks)

### **Handbook Revisions**

- *Address and evolvment procedures updated [2021.05.01]*
- *Application-Eligibility section updated; Practitioner/Advanced Practitioner separated [2016.08.01]*
- *Handbook and forms reformatted; clarified application and evolvment procedures; updated and added online class policies; added Phase 4 and Standard Phase 4 definitions; clarified Bench Assist, Co-Teach, and Supervised Teach requirements in Standard Phase 4; updated and clarified evolvment recommendation requirements [2024.04.01]*
- *Updated evolvment requirements; updated non-SOBI member instructor allowances in training [2025.09.01]*

### **Society of Ortho-Bionomy International®**

[www.ortho-bionomy.org](http://www.ortho-bionomy.org)

[office@ortho-bionomy.org](mailto:office@ortho-bionomy.org)