

Copyright Guidelines for TherapyWorks, Inc.

TherapyWorks, Inc.

P.O. Box 95316

Albuquerque, NM 87199

Phone:(877) 897-3478 Fax:(505) 899-4071

www.AlertProgram.com

Email: manager@AlertProgram.com

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INTRODUCTION

This document is provided to support your desire to appropriately share, present, research, and/or publish concepts related to the Alert Program[®]. TherapyWorks, Inc. reserves all rights in its intellectual property. Theft of intellectual property is a criminal offense.

IN GENERAL,

IT IS NOT OK to:

- ✓ Teach groups of individuals to implement the program through training sessions;
- ✓ Share any Alert Program[®] copyrighted materials, including vocabulary, graphics, foundational concepts, without appropriate credit/referencing;
- ✓ Post Alert Program[®] graphics, diagrams, photos or intellectual materials on-line;
- ✓ Record any electronic lectures, discussions, or instructions for use when teaching a class;
- ✓ Publish any materials that include Alert Program[®] copyrighted concepts, vocabulary, or materials without appropriate permission, referencing and citation; or
- ✓ Adapt or Create derivative works from the Alert Program[®] and call it your own!

IT IS OK to:

- ✓ Share basic concepts and underlying theory with others to support success of the program with identified clients (adults and children).
- ✓ Share Alert Program[®] copyrighted materials with adequate credit/referencing provided;
- ✓ Request permission to use a copyrighted graphics, diagrams, photos, or intellectual materials; and
- ✓ Tell people about our program and give them a link to our website.

Information in this packet is relevant to you if you desire to reference, reproduce, and/or copy any portion of TWI copyrighted materials for the purpose of:

- Developing handouts or visual-aids for an in-service presentation, workshop, conference, educational course or training;
- Providing educational information for parents, teachers, other interested individuals;
- Electronic communications including websites, CD, DVD;
- Professional work or publications including (but not limited to) texts, manuscripts, articles, manuals, handbooks, posters;
- Research;
- Program development/proposals; or
- Product development (i.e. games, therapeutic tools, books).

To legally protect against copyright infringement and to ensure that the Alert Program[®] is implemented in an authentic way to promote optimal outcomes, we monitor and enforce copyright laws as they apply to Alert Program[®] information, materials, and products.

Copyright law exists as a way to honor and protect an individual's work and intellectual property. TherapyWorks, Inc. (TWI) owns the legal copyright and trademark for the Alert Program[®] and "How Does Your Engine Run?"[®] and, its related published products. While TWI encourages and promotes the use of the Alert Program[®] (AP), it expects that:

- 1) the intellectual property of TWI be appropriately referenced in publications, presentations, programs, products, research/literature and professional documents; and
- 2) TWI be compensated when marketing and promotion of such uses result in personal monetary gain.

Note: TWI understands that copyright issues can be complicated. In today's world, many professionals do not understand or are simply unaware of the complexities of copyright law. The *Copyright Clearance Center* (www.copyright.com) is a valuable resource for attaining general information about this topic. They provide many educational materials and support. An excellent video titled "Copyright Basics" provides core educational information and is easily accessible on-line.

SHARING INFORMATION ABOUT THE ALERT PROGRAM®

Sharing concepts about the Alert Program® (AP) is a great idea! In fact, TherapyWorks, Inc. (TWI) encourages participants to actively talk to others about the AP and the basics of the underlying theory. This sharing is an essential ingredient for successful use of the program. However, we have found that the concept of “sharing” needs further clarification so that the success of the AP is not compromised.

A. Who is best qualified to share concepts of the Alert Program®?

It is intended that the “AP Leader” who adapts and implements the AP have sufficient background, experience and understanding of the core concepts of the program, the underlying Theory of Sensory Integration, and related self-regulatory issues. This individual, typically an occupational therapist, although not exclusively so, is most qualified to share information about the AP and the basic underlying theory. Of importance, TherapyWorks, Inc. believes that individuals, who plan to present a brief overview of the Alert Program® to others should:

- have experience using the program over a period of time, optimally a year or more; and
- possess solid knowledge of the Theory of Sensory Integration in order to help problem solve, adapt the program to meet the unique needs of each individual, and create conditions for optimal success.

B. Given copyright restrictions, what AP information can be shared with others?

In considering sharing information about the AP with others, the critical question one should ask oneself is “What outcome am I striving for in sharing this information?.” Are you hoping to entice other professionals to explore and learn about this approach? Are you providing an overview to other team members to support your implementation of the program? These are perfectly reasonable outcomes. On the other hand, are you hoping to train others to go out and apply this program in their respective settings? This outcome is problematic.

TWI does not believe, due to copyright restrictions related to proprietary information, that teaching *groups* of individuals to implement the program through training sessions, workshops, or in-service trainings is appropriate. This is solely the role of TWI who will gladly work with individuals, facilities, or school systems in developing the most appropriate training to meet intended outcomes. It is important that you understand that training others how to implement and use the AP is solely the right of TWI. Be an AP Leader and not an AP Instructor.

C. What should be the AP Leader’s focus for sharing?

As an AP Leader, it is important to entice others to explore and learn the basic concepts of the Alert Program® so they can support an individual’s use of the program vocabulary and strategies. This “leading” includes helping team members to experientially learn about the AP basics (and sensory processing theory basics) so that the individual’s social and cultural environment is supportive of developing self-regulation. Obviously, the more experienced the practitioner, the better he/she will be in enticing others to be detectives in supporting the use of the Alert Program®.

It is recommended that the AP Leader's sharing of basic concepts and underlying theory occur in brief sessions with specific outcomes identified. Outcomes should focus on that which supports the Leader's implementation of the program with a specified group of individuals. Examples of possible outcomes might be as follows:

- Understanding one's own personal sensorimotor preferences to become a better observer of another individual's self-regulation;
- Understanding the use of the engine analogy or appropriate self-regulation vocabulary;
- Understanding of how to be a "detective" to guide an individual's choice of self-regulation strategies; and
- Understanding and becoming familiar with all self-regulation strategies an individual may be using in a home, community, facility, or school settings.

Whatever instructional strategies (PowerPoint, handouts, visual aids, etc.) are used, TherapyWorks expects that the intellectual property be appropriately referenced. Other sections of this document provide guidelines to support this endeavor (see Citation and Reference section).

D. Are there supportive training materials available from TherapyWorks?

When providing in-service or sharing sessions, we encourage you and your participants to take advantage of our free and for purchase resources offered on our website (AlertProgram.com). Contact us for information on bulk rate pricing.

TWI continues to develop teaching tools for use in larger facilities such as school districts and regional programs. Be sure to check regularly for new products on our website and also assure that your current email address is in our database so that we can notify you when new training materials are available.

E. What is our intention for these detailed guidelines related to "sharing"?

It is important to realize that while the AP is a simple framework, it is also a precise method that works only if understood and applied accurately. TWI is not willing to accept the AP being altered, watered down, inaccurately taught, incompletely taught or otherwise compromised to the extent that a client, parent, teacher or caregiver might say "I tried, it, but it didn't work. This would not be of benefit to any of us who strive to help individuals with self-regulation, let alone to the children/individuals who might benefit from the program.

We are dedicated to ensuring the Alert Program[®] is implemented and distributed in an authentic and effective way to promote optimal outcomes. Please help us protect this work through responsible sharing and copyright protection.

If you see inappropriate and/or illegal use of the AP, please notify us via email at manager@AlertProgram.com or contact us on our website (www.AlertProgram.com).

PROFESSIONAL PROJECTS

Guidelines Supporting Professional Writing, Research, or Program Development

A. Support for general professional writing/projects

TherapyWorks, Inc. (TWI) office staff is available to help you to adapt figures, clarify references, or offer other support for you to finalize your project with proper copyright and trademark information related to the Alert Program® (AP). If this service is desired, it is critical to build sufficient time into your timeline to allow adequate support to occur. Receiving last minute requests adds enormous stress to all involved, and such deadlines often cannot be met due to current work demands and out-of-town travel. Prior proper planning is always prudent. As previously suggested, it is best to allow at least 14 days advance notification. Need support? Email manager@AlertProgram.com with your specific request.

B. Research

TWI actively encourages and supports a research process that examines the effectiveness of the Alert Program® with varied populations. Check out the Research tab on our website (www.AlertProgram.com) for more information.

C. Developing integrated intervention programs

All professionals work towards developing effective intervention programs that provide services to meet the needs of a given population. Program development takes many forms. Intervention/service programs may be developed around the expertise of one professional discipline or may be developed with an interdisciplinary focus. For example, an occupational therapist may develop a unique systematic program (that incorporates/adapts all or portions of the AP) for use within one or several classrooms within a given school; or, s/he may be involved in a system-wide program development that is more comprehensive and, perhaps interdisciplinary in nature. Systematic, well developed model programs may emerge that may be applied more broadly to additional settings or marketed for broader distribution.

Those individuals involved in developing intervention/service programs that incorporate all or portions of the AP are encouraged to familiarize themselves with the "Citation and Referencing Guidelines" and "Duplication of Alert Program® Materials" sections of this publication. When the AP approach (concepts, strategies, vocabulary) is integrated into an overall documented therapeutic program, appropriate referencing is essential. Also, due to the inclusion of intellectual property (all or parts of the Alert Program®), all such programs that are marketed and sold for monetary gain must be reviewed and negotiated with TWI with regards to appropriate division of royalties.

CITATION AND REFERENCING GUIDELINES

The following provides general guidance for trademark usage, naming, vocabulary, contact information, titling, referencing, and accessing training materials.

A. Trademark symbol (®)

The names *Alert Program*® and "*How Does Your Engine Run?*"® are both trademarks of TherapyWorks, Inc. and must be referenced using the federal registration symbol (®).

B. Authors' names

Use the author's correctly spelled names and order: *Mary Sue Williams* (listed first) and *Sherry Shellenberger* (**not** *Shelly Shellenberger*).

C. General referencing and appropriate naming of the Alert Program®

When referencing the *Alert Program*® in a manuscript, text, article, handout, or naming a therapeutic group program refer to the program as the *Alert Program*® and **not** "*How Does Your Engine Run?*"® and **not** Engine Program. An *example* of an acceptable in-service/sharing session title is:

An Overview of the Alert Program®
(Co-authors: Mary Sue Williams & Sherry Shellenberger)
presented by Jane Smith on September 15, 2016

D. Vocabulary related to the Alert Program®

The use of the word "Engine" and other related Alert Program® words and symbols in relation to the concepts of modulation, self-regulation, central nervous system (CNS) arousal or self-management is the intellectual property of TherapyWorks, Inc. and needs to be referenced when used in dissemination of information.

E. TherapyWorks, Inc. address, phone, fax, website, and email

When you reference the Alert Program® in any printed form or verbally, it is recommended that our address, phone, fax, website, and email be included:

TherapyWorks, Inc. P.O. Box 95316, Albuquerque, NM 87199
Phone: (877) 897-3478; Fax: (505) 899-4071; website: www.AlertProgram.com
Email: manager@AlertProgram.com

F. Titles and reference citations (American Psychological Association (APA) format) for publications and products

1. Booklet

Proper Title:

An Introduction to "How Does Your Engine Run?"® The Alert Program® for Self-Regulation (1992)

Proper APA citation:

Williams, M.S., & Shellenberger, S. (1992). *An introduction to "How Does Your Engine Run?"® The Alert Program® for self-regulation* [Booklet]. Albuquerque, NM: TherapyWorks, Inc.

2. CD

Proper title:

The Alert Program® CD: with Songs for Self-Regulation (1995)

Proper APA citation:

Williams, M.S. & Shellenberger, S. (1995) *The Alert Program with songs for self-regulation* [CD]. Albuquerque, NM: TherapyWorks, Inc.

3. Book

Proper title:

"How Does Your Engine Run?"[®] A Leader's Guide to the Alert Program[®] for Self-Regulation (1996)

Proper APA citation:

Williams, M.S., & Shellenberger, S. (1996). "*How Does Your Engine Run?*"[®] A leader's guide to the Alert Program[®] for self-regulation. Albuquerque, NM: TherapyWorks, Inc.

4. Book

Proper title:

Take Five! Staying Alert at Home and School (2001)

Proper APA citation:

Williams, M.S., & Shellenberger, S. (2001). *Take five! Staying alert at home and school*. Albuquerque, NM: TherapyWorks, Inc.

5. Book/CD

Proper title:

Test Drive: Introducing the Alert Program[®] Through Song (2006)

Proper APA citation for Book:

Williams, M.S., & Shellenberger, S. (2006). *Test drive: Introducing the Alert Program[®] through song*. Albuquerque, NM: TherapyWorks, Inc.

Proper APA citation for CD:

Williams, M.S., & Shellenberger, S. (2006). *Test drive: Introducing the Alert Program[®] through song* [CD]. Albuquerque, NM: TherapyWorks, Inc.

6. Game

Proper title:

Alert: Go Fish! (2008)

Proper APA citation:

Williams, M.S., & Shellenberger, S. (2008). *Alert: Go fish!* Albuquerque, NM: TherapyWorks, Inc.

7. Game

Proper title:

Alert Bingo (2008)

Proper APA citation

Williams, M.S., & Shellenberger, S. (2008). *Alert bingo*. Albuquerque, NM: TherapyWorks, Inc.

8. Game

Proper title:

Keeping on Track: Alert Program[®] Companion Game (2008)

TherapyWorks, Inc.

Proper APA citation

Williams, M.S., & Shellenberger, S. (2008). *Keeping on track: Alert Program[®] companion game*. Albuquerque, NM: TherapyWorks, Inc.

DUPLICATION OF ALERT PROGRAM® MATERIALS

The Alert Program® (AP) is about getting the right tools into the right hands to help make kids and adults with self-regulation issues happy and functioning members of their community! We know first hand that appropriate use of the AP can support that intent. While it is a *simple* framework, it is also a *precise method* that works only if understood and applied accurately.

Consequently, we do not allow copies to be made of certain parts of our books if we believe that the consumer does not have sufficient background and understanding of the core concepts and underlying theory for application. It is important that individuals learn how and why to choose sensorimotor strategies to support an individual with self-regulation difficulties. With this in mind, the following copyright processes have been put into place to help assure ethical and appropriate use of AP materials.

A. Materials Exempt from Requiring Copyright Permission: Permission to copy the following materials has been granted by the authors:

1. Appendix pages of the "How Does Your Engine Run?"® *A Leader's Guide to the Alert Program® for Self-Regulation* (Leader's Guide) are exempt from requiring copyright permission from TherapyWorks, Inc. (TWI). The Appendix pages may be photocopied if properly referenced and used for non-profit educational purposes.

No other TWI printed materials from the Leader's Guide may be reproduced/copied without express written consent by the authors.

2. Lyrics and Chords (Appendix) from *Test Drive: Introducing the Alert Program® Through Song*" (book) are exempt. No other materials from *Test Drive* are exempt from requiring permission from the authors to reproduce.

Please note that **ALL** materials from the Alert Program® CD, Take Five!, Test Drive (book and CD), Introductory Booklet, games, and all handout pages from any Alert Program® training require the copyright permission process (see "B" below).

B. Reproducing or Adapting Non-Exempt TWI Materials: To obtain permission to reproduce or adapt TWI non-exempt materials, email your request to manager@alertprogram.com

1. All pages from any TWI publications (booklets, books, games), with the exception of those pages exempted above, require explicit written permission to duplicate or adapt from TherapyWorks, Inc.
2. Burning (or any other technological reproduction of) copies of any of TWI CD or DVD productions is considered pirating, an infringement of copyright law, and illegal.
3. Direct use or adaptation of figures from any of the TherapyWorks, Inc. publications may require a special copyright permission.
 - a. When permission is granted by TWI for direct use of an original figure, it is correct to state: "*Reprinted with permission from TherapyWorks, Inc.*".
 - b. When permission is granted by TWI for use of an adapted figure, it is correct to state: "*Adapted with permission from TherapyWorks, Inc.*".

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- c. TherapyWorks can only provide permission for figures created by Williams and Shellenberger (figures 1-1, 1-5, 1-7, 1-15, and 1-16 in the Leader's Guide). For all other figures in Chapter 1 of the Leader's Guide, you must request copyright permission directly from the originator:
- 1) Figure 1-2: Contact Western Psychological Services (WPS) at customerservice@wpspublish.com
 - 2) Figure 1-3: (Pyramid)_Note: Maryann Trott and Kathleen Taylor have given copyright permission for this figure to be photocopied for educational purposes with their correct reference included. For publication requiring written permission, contact Maryann Trott via email: mom.trott@gmail.com
 - 3) Figure 1-4: Cutler, Stevens-Dominguez, Oetter, and Westby at University of New Mexico, University Affiliated Program (UAP) Training Unit; Contact the Center for Development and Disability <http://cdd.unm.edu>
 - 4) Figure 1-6: Refer to Avanti Educational Program website: <http://www.avanti-ed.com> or contact email AvantiEducationInc@gmail.com
 - 5) Figure 1-8: Patti Oetter; Email: oetterp@yahoo.com