Division Officer Handbook



AMERICAN
PSYCHOLOGICAL
ASSOCIATION

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Chapter 1: Divisions and the American Psychological Association

The Division/APA Relationship

As outlined in the APA Bylaws and the Association Rules, divisions are autonomous in all matters within their fields that are not reserved to the association and the Council of Representatives by APA Bylaws or Rules. As noted in the Article V of the APA Bylaws, each division has the right to determine:

- Who, among the division members, shall have the right to vote in divisional matters.
- Qualifications and method of electing a required President and Secretary and other such officers needed to carry out the division's business.
- Its own bylaws and rules of procedure within the framework of the APA Bylaws.
- The appointment of such committees and adoption of such regulations for the conduct of its business (except that its committee and governance structure is subject to review by the Board of Directors of APA).

The "ASME Guidelines" were approved by the Board of Directors in 1985 and revised in 1992. Any questions about the "ASME Guidelines" should be addressed to the APA Office of General Counsel (OGC).

The APA ASME Guidelines

1. Standards, Guidelines and Credentials

Extreme care is necessary in the development of standards, guidelines, or credentials that affect economic interests or competition. When these kinds of APA programs might have effects upon scope of practice or modes of practice, compensation or reimbursement, professional engagements or positions, assignment of tasks or titles, or other economic or competitive factors in psychology, the antitrust laws are implicated. Standards or guidelines must be submitted to the Office of General

Counsel for review and approval.

Standards, guidelines, or credentials must be reasonable. Reasonableness can be enhanced by circulating the proposed standards, guidelines, or credentials for comment by those who will be affected. The final versions should reflect, to the extent practicable, the consensus of opinion of those affected by the standards, guidelines, or credentials after review and consideration of all comments received.

Standards, guidelines and credentials must state who is authorized to interpret them, such as the Council of Representatives, the Board of Directors, other boards, committees, divisions, or their authorized representatives. Interpretations must be issued in writing. Extreme care must be used in formulating any statements regarding standards, guidelines, or credentials which are expected to be relied upon by APA members or by others, whether or not there are specific enforcement mechanisms related to the standards, guidelines, or credentials.

If the standards, guidelines, or credentials do include enforcement mechanisms, there must be provisions to assure that due process is afforded to those affected, including the opportunity for appeal. Divisions that contemplate the development of standards or guidelines must comply with the requirements of Association Rule 100-1.5 which was adopted by council in August 1995.

2. Correspondence and Statements

Official correspondence and statements, whether issued explicitly or implicitly by or on behalf of APA or a body integral to APA, must be approved in advance.

Approval can be either by the entire body responsible for the correspondence or statements, such as where an APA board or committee has voted on a resolution to issue correspondence or statements, or by the highest level of volunteer leadership or staff leadership involved, such as the chair of a board or committee or the chief staff official responsible for the board or committee, if the body has delegated authority to those individuals. The correspondence or statements must then be limited to what has been authorized and must be within the scope of duties of the volunteer or staff leadership.

Other correspondence or statements must not be on APA letterhead and, if they could possibly be interpreted as issued by or on behalf of the association or a body integral to the association, must include a disclaimer indicating that they are not

made by or on behalf of APA.

3. Meetings and Conflicts

All meetings of APA or bodies integral to APA must be scheduled in advance if practicable, have agendas circulated to attendees in advance, be open if practicable, and have written minutes prepared and circulated to attendees.

Conflicts of interest are subject to separate APA guidelines on that subject.

Conflict of Interest Policy

The Council of Representatives has adopted a conflict of interest policy, Association Rule 80.2: Conflict of Interest and Duality Guidelines for the Board of Directors, which applies to APA boards and committees and officers of divisions.

Divisions are asked to contact the OGC with any questions about this policy.

Whistleblower Protection and Conduct Policy: Reporting Ethical Violations at APA

As individuals performing services for APA, whether paid or volunteers, our daily decisions and actions greatly impact the success of the association. Each of us is expected to adhere to the highest standards of honesty, integrity and fairness. These standards are not new to APA; they are a part of our longstanding tradition to behave in an ethical manner and in accordance with all laws, applicable rules and regulations, and policies and procedures. It is APA's policy to comply with all applicable laws, rules and regulations.

It is the policy of APA to encourage individuals to bring to the attention of management, preferably in writing, their concerns regarding any conduct they believe is legally or ethically questionable including possible instances of corporate fraud, unethical business practices, conflicts of interest, sexual harassment or other or violations of state or federal law ("Inappropriate Conduct"). Those with good faith concerns regarding any Conduct they believe is questionable should contact any lawyer in the Office of Legal Counsel immediately. This policy does not require reporting the Inappropriate Conduct to any individual who is involved in the Conduct. Once a complaint is registered, legal counsel will confer with other

appropriate individuals and will follow general complaint procedures outlined in APA policy B5.08.

No person who has been accused in the complaint will participate in the investigation or resolution of the complaint. If necessary, due to the disqualification of the persons who would normally process the complaint, the investigation and resolution of the complaint will be done by the Treasurer of APA's Board of Directors or a designee.

APA also prohibits any form of retaliation, including discrimination, against any individual who reports any truthful information relating to the commission or possible commission of any crime to an officer or employee of a federal agency. Such retaliation will be considered the basis for disciplinary action, including possible termination of employment, governance or leadership role, or of any contract for services. In addition, individuals performing services for APA risk criminal penalties if they are found to have violated the law prohibiting such retaliation.

Document Destruction Policy

Any individual performing services for APA who becomes aware of a threatened civil lawsuit or governmental or criminal investigation or proceeding involving APA or related entities should immediately contact any lawyer in the Office of General Counsel (OGC) and should cease destroying any related records or documents (including electronic records or documents), even if such destruction is provided for in the APA policies. Failure to do so is grounds for disciplinary action, including possible termination of any contract for services.

It is also unlawful to alter, destroy, conceal, falsify or make a false entry in, any record or document for the purpose of impeding, obstructing, or influencing an existing or contemplated government investigation. Any individual who takes such action regarding a record or document (including electronic records and documents) will also be subject to disciplinary action, including possible termination of employment or of contracts for services. In addition, individuals risk criminal penalties if they are found to have violated the law.

Please contact the OGC if you have questions about the retention or destruction of any specific document.

Committee on Division/APA Relations

The Committee on Division/APA Relations (CODAPAR) is the offspring of the original Steering Committee for the Division Leadership Conference and was appointed for the first time in late 1984. CODAPAR, as the result of action taken by the Council of Representatives in February 1987, was endorsed in principle and assigned as an ad hoc committee of the Policy & Planning Board (P&P). Then, in December 1989, the Board of Directors placed CODAPAR as an ad hoc committee of the Board of Directors for a period of three years. In December 1992, CODAPAR's assignment was extended for an additional 5 years and its mission expanded to include a training component.

In August, 1995, the Council of Representatives approved CODAPAR as a continuing committee which would report to the council through the Board of Directors. CODAPAR's mission statement and its nomination and election procedures are contained in Association Rule90-10. Committee on Division/APA Relations which follows:

"There shall be a Committee on Division/APA Relations (CODAPAR) which shall be generally concerned with the mutual involvement of divisions and APA in fostering psychology as a science, as a profession, and as a means of promoting human welfare and shall: (1) serve an advisory function to the Division Engagement Office and Chief Executive Officer on the mutual implication and impact of activities of APA and divisions; (2) provide leadership to facilitate coordination and communication among divisions and between divisions and APA; (3) make proposals to enhance structural, functional and policy relations between APA and divisions; (4) plan and host the Division Leadership Conference; (5) provide leadership in developing training programs for division officers at the Division Leadership Conference, the APA annual meeting, or other such forums, to enhance the functioning and benefits offered by divisions; and (6) act as a facilitator in resolution of disputes among divisions.

CODAPAR shall consist of six members, each serving a three-year term, and shall report to council through the Board of Directors. At least one member of CODAPAR shall be an early career psychologist. Two new members of CODAPAR will be appointed annually. Nominations will be solicited from divisions, with each division invited to submit a nominee for CODAPAR. Eligible nominees are APA members who

are the division's president or another officer or board member for that division. Upon receipt of division nominations, CODAPAR will submit to the Board of Directors a listing of nominees along with its recommendation for achieving balance in representation of the broad interests of divisions as designated in defined slates. An additional goal shall be to achieve diversity among CODAPAR members by striving to obtain gender balance and at least one member from underrepresented groups. The Board of Directors will appoint two new members annually from the slates submitted by CODAPAR."

Nominations to CODAPAR are solicited from the divisions. Each division is invited to submit one nomination for the two open positions that occur each year. Nominees should be past officers or active division leaders with significant governance experience, including committee and task force chairs. The committee is open to early career psychologist candidates who meet the criteria. CODAPAR prepares a list of nominations and its recommendations for achieving balance in the representation of the broad interests of divisions. This information is presented to the Board of Directors for final appointment.

Division Engagement Office

The Division Engagement Office offers information, referral and ombudsman services to division officers, APA and division members. The office publishes the *Division Digest* , an online newsletter for division officers; arranges for the annual Division Leadership Conference ; and provides staff support for the Committee on Division/APA Relations.
Division engagement liaisons are assigned to specific divisions with the goal of providing a single point person to assist the division in navigating the larger APA and developing a deep level of knowledge on each division's leadership, activities and organizational structure in order to be able to advise and assist as requested by the divisions.

Division Annual Reports

Divisions are required under the Association Rules (100-1.1-1.3) to submit an annual

report on or about Feb. 1 of the subsequent year, covering activities of the division during the preceding year. By means of the report, divisions outline their activities, new initiatives and governance changes, and respond to questions regarding compliance with APA Bylaws, rules and policies. The Committee on Division/APA Relations (CODAPAR) and staff from the Division Engagement Office coordinate the report, including review by the Office of General Counsel. A compiled summary, highlighting major activities of the preceding year as well as planned initiatives for the subsequent year, is presented to the Board of Directors.

As general timeline, divisions will be engaged with writing the annual report from November through February. In November, division Presidents are contacted in order to identify the person who will prepare the year's report. Each division has its own history for this role, which is often fulfilled by the executive officer, president, past-president, or secretary. By early December, the writer will receive a preparation guide outlining the questions to be answered, as well as login/password information for online submission of the report by Feb. 1. The previous year's report will also be provided as a reference tool.

The questions may vary, but are devised to elicit information about special projects, planned initiatives, advocacy activities, inter-organizational linkages, contracts, governance changes, publications and social networking. Divisions will also be asked to upload selected documents. All divisions will be asked to upload newly revised bylaws (if any), any new position or policy statements, and a roster of division officers as of Feb. 1. Divisions that file their own Internal Revenue Service (IRS) Form 990 and IRS Form 990-T are asked to submit their previous year's form at this time if they have not done so already.

Division Bylaws, Regulations and Committee Structure

As stated in the APA Bylaws (Article VI, Section 7), each division is required to draw up and maintain its own bylaws and rules of procedure within the framework of the APA Bylaws. Newly forming divisions which are developing their bylaws and existing divisions which are contemplating bylaws amendments should review the listing of standard bylaw articles which follows to make certain that the division's proposed bylaws conform to the APA Bylaws and the Association Rules.

I. Name and Purpose

This article specifies the division name and the purpose of the division. Bylaws and rules which apply to this article are: (APA Bylaws Article VI, Section 1) "Divisions may be organized to represent major scientific and professional interests that lie within the association."

(APA Bylaws Article VI, Section 3) "Council may create such divisions provided that (1) they represent an active and functionally unitary interest of a group of members, (2) their proposed objectives fall within the scope of those specified in Article I..." (APA Bylaws Article I), "The objects of the American Psychological Association shall be to advance psychology as a science and profession and as a means of promoting human welfare by the encouragement of psychology in all its branches in the broadest and most liberal manner; by the promotion of research in psychology and the improvement of research methods and conditions; by the improvement of the qualifications and usefulness of psychologists through high standards of ethics, conduct, education and achievement; by the establishment and maintenance of the highest standards of professional ethics and conduct of the members of the association; by the increase and diffusion of psychological knowledge through meetings, professional contacts, reports, papers, discussions and publications; thereby to advance scientific interests and inquiry, and the application of research findings to the promotion of the public welfare." (APA Bylaws Article VI, Section 3) "Divisions when formed from existing societies or organized as new societies may use a society name" (Association Rules 100-3). A division may change its name as long as the change: (1) does not extend the scope of the scientific and/or professional field for which the division was recognized at the time it was established by the Council of Representatives, and (2) is not inimical to the welfare of any other division. In order to avoid conflict, no division name change shall be voted upon by a division or become effective until the following procedures are first complied with. A division desiring to change its name shall give written notice of the proposed name change to the APA recording secretary. The division shall provide with the notice whatever information it deems appropriate to explain or support the proposed name change. The recording secretary shall notify all divisions and members of council of the proposed name change and provide them with a copy of the notice of proposed name change. The secretary shall advise the divisions and members of council that any objections to the name change must be received by the recording secretary within 60 days of the date of the secretary's notice. All objections by divisions or

members of the council must be in writing and shall fully state the basis for the objection. If objections are received, the proposed name change will be submitted to the Council of Representatives for decision.

If no objections are received the proposed name change may become effective after the 60 day notice has expired. If the proposed name change is submitted to council, it may become effective only after council's approval. No name change, however, whether approved by lack of objection or by vote of council, may become effective until approved by the proposing division in the manner required by the division's applicable bylaws, rules or procedures."

II. Membership

Definitions of the division's membership categories and criteria for each category are included in this section. In some cases, divisions have chosen to use this section of their bylaws to describe procedures for acceptance/election of new members as well as fellowship criteria and procedures. Other divisions have found it more expedient to include procedures within divisional operating procedures which can be revised upon the vote of the division's executive committee rather than by a formal bylaw vote by the division's membership. Bylaws and rules which apply to this article follow:

- (APA Bylaws Article VI, Section 2) "Any member of the association may apply for membership in one or more divisions under the rules of eligibility and election established by the division. Associate members or members may remain associate members or members without divisional affiliation. A division may include in its membership those who do not qualify or do not desire membership in the association. It may determine its own qualification for its membership classes, provided that the designation fellow shall be reserved for members of the division who are fellows of the association."
- (APA Bylaws Article VI, Section 3) "Council may create such divisions provided that...(c) their membership is not restricted on any basis other than psychological interest and qualifications..."
- (APA Bylaws Article VI, Section 6) "A division may determine what persons among its membership shall have the right to vote in divisional matters." • (Association Rule 10-7.1) "A division may have requirements for fellow status in that division beyond those required by the association. The Central Office will endeavor so far as possible to assist a division in administering these additional

requirements but is not required to do so."

III. Officers

This article describes the elected offices of the division along with criteria for each office, the term of office and the means of determining a successor for an officer who cannot finish his/her term. In some cases, divisions have included descriptions of the duties of each office in this article. Other divisions have chosen to include this description in their operating procedures. Bylaws and rules which apply to this section are:

- (APA Bylaws Article VI, Section 6) "A division shall have a president and a secretary and other officers as it may desire. The qualifications for its officers and the method of their election shall be determined by the division."
- (APA Bylaws Article V, Section 5), "Council representatives of a division or state/provincial association shall be members of the division or state/provincial association, and members of the association, and shall be elected for a period not to exceed three years. If during that three-year period the division or state/provincial association is allocated fewer seats, the division or state association shall recall the appropriate number of representatives. Their term of office of the recalled member is thereby terminated."
- (APA Bylaws Article V, Section 8) "A council member who has served for six consecutive years shall not be eligible for election or appointment for a period of one year as a representative from any division or state/provincial psychological association, or coalition."

IV. Executive Committee or Board of Directors

This article generally contains a listing of the offices that comprise the division's governing body. It may also specify meeting times for this body, balloting procedures and measures to handle emergency situations by the entire body or a subset of its members (e.g. the president, past president, president-elect, secretary and treasurer as an emergency action subcommittee).

V. Committees

This article delineates standing committees of the division and may describe committee terms as well as duties and procedures to be used by the committee. In addition, the division may choose to include annual reporting requirements for its committees in this article. The following bylaw applies to this article:

- (APA Bylaws Article VI, Section 7) "Each division may elect such officers, appoint such committees, and adopt such regulations for the conduct of its business as it may desire, except that its committee structure is subject to review by the Board of Directors of the association."

VI. Meetings

This article describes the time and place of the division's meetings, notice of meetings, what constitutes a quorum and how members can introduce agenda topics.

VII. Nominations and Elections

This article delineates the nomination and election process for elective offices. The following bylaws address division elections:

- (APA Bylaws Article VI, Section 6) "A division shall have a president and a secretary and other officers as it may desire. The qualifications for its officers and the method of their election shall be determined by the division."
- (APA Bylaws Article X, Section 4) "The Election Committee shall also secure reports from the divisions and from the state associations of the results of all elections conducted by them. The election results shall be reported by the Election Committee to the Board of Directors at least one month prior to the business meeting of council held in conjunction with the annual convention."

VIII. Finances

This section generally contains a statement regarding the division's not-for-profit status, the setting and collection of dues, resignation by non-payment, the division's fiscal year, and budget review and approval process. APA Bylaws and rules which apply to this article are:

- (APA Bylaws Article XIX, Section 4) "There shall be made available to each division a fixed amount, to be determined by council, from the dues paid by each member of the association who is a member of that division. A division may require additional dues of its own members."
- (Association Rule 100-6.1) "Any APA member who is exempt from paying dues shall also be exempt from further payment of division dues and assessments. However, divisions may, at their discretion, assess and collect from these members a mandatory subscription price/service fee to cover the costs of providing such division publications as may be requested by these members."

- (Certificate of Incorporation, Point 5) "In the event of dissolution or termination of the association, title to and possession of all of the property of the association shall pass forthwith to American Association for the Advancement of Science, if then in existence and qualified for exemption under the Internal Revenue Code (IRC)of 1954 as amended, and otherwise to such organization as the Board of Directors shall deem best fitted exclusively to carry out the objects and purposes for which the association was founded."

IX. Amendments

This final article should describe the process by which the bylaws are amended including how an amendment is proposed, how the membership is notified of the proposal, the means by which the vote is taken and what constitutes passage. This section should address how the ballots are delivered to the member, whether by postal or online delivery or a combination of the two. Divisions have been asked by the association to amend their bylaws to allow for online voting because in 2007 the APA Bylaws were amended and approved by membership to permit online voting in all APA elections.

Divisions that are in the process of revising or amending their bylaws are asked to submit proposed changes to the Division Engagement Office. Review of proposed changes can prevent potential conflicts with restrictions outlined in the APA Bylaws and Association Rules, and with current APA policies and procedures. Changes in bylaws can have consequences that are not intended or envisioned by a division and the review by staff can help the division avoid such issues.

The APA Bylaws (Article VI, Section 7) require that each division file a copy of its current bylaws, regulations, and committee structure with Central Office. The Division Engagement Office is the repository for information regarding the structure and functioning of divisions. The division is further required to submit amended or revised bylaws as changes occur.

Division Legal Activities

It is important for divisions to exercise caution when engaging in activities that could expose the division or APA to legal risk.

Lobbying and Election Activities

General

Organizations such as APA that qualify for federal income tax exemption under 501c(3) of the IRC have the most favorable tax status. That status enables APA (including its divisions) to earn tax free income related to APA's tax-exempt purposes, receipt of grants from foundations, deductibility of contributions to the organization by members and others, advantages in maintaining nonprofit postal rate privileges, and other advantages as well. It is therefore vital for APA and its divisions to be aware of the extent of, and limits on, lobbying and election activities which are expressly regulated under the IRC.

What is lobbying?

To be considered lobbying, a communication must **refer to and reflect a view on** a specific legislative proposal or legislation that has been introduced before a legislative body. Lobbying may either be direct or grass roots. **Direct lobbying** is a communication with a member or employee of a legislative body, or with other government employees if the purpose of the communication is to lobby. Direct lobbying includes contacting members to encourage them to communicate with these individuals. **Grass roots lobbying** is an attempt to encourage the public to communicate with these individuals. An organization engages in grass roots lobbying when, directly or through its members, it urges that the public contact legislators, or provides the public with the address or phone number of a legislator or a petition or tear-off postcard, or even merely identifies legislators who will vote on the item referred to.

What is Not Lobbying?

Several activities are excepted from the definition of lobbying. Lobbying does not include providing **technical assistance or advice** to a governmental body in response to its unsolicited written request. Communications about pending legislation may fall under the exception for **nonpartisan research.** This exception applies to communications presenting research, analysis or study on an issue in a balanced and objective manner.

How Much Lobbying is Permitted?

To maintain nonprofit status, APA and its divisions must keep lobbying activities within legally specified permissible limits. The permissible limit for lobbying for APA and its divisions is governed by a special "expenditures test" — which provides for quantifying exactly how much lobbying (grassroots and direct lobbying) APA and its divisions may engage in each year. For purposes of this test, APA's lobbying is added to expenditures for lobbying incurred by APA divisions. Divisions wishing to support public policy initiatives should coordinate their activities through APA's government relations offices. It is important to note, however, that APA divisions which are separately incorporated and which are tax exempt under 501c6 have different, and in some respects, more stringent lobbying regulations with which to comply. Divisions wishing to participate in lobbying activities must consult with the APA Office of General Counsel prior to the division's initial involvement.

What Records of Lobbying Activity Should be Maintained?

Under 501(h), detailed **disclosure** and thorough **record-keeping** are required. It is the responsibility of the division to maintain documentation of its direct and grassroots lobbying expenditures. If an activity has mixed lobbying or both lobbying and nonlobbying aspects, the organization will be expected to allocate expenditures accordingly. The allocation must be reasonable and supportable to withstand IRS scrutiny. **Financial reports, invoices from outside suppliers, employee time records** and **other documentation** of expenditures should identify those spent on direct and grassroots lobbying and should allocate expenditures for **mixed lobbying** (direct and grassroots) and **mixed purpose** (lobbying and nonlobbying) activities. The divisions that are involved in either grassroots or direct lobbying must contact the APA Office of General Counsel for more information regarding annual reporting requirements.

Election Campaign Activity

APA and its divisions are expressly prohibited by the IRC from engaging in any electioneering. The IRC provides that neither APA nor its divisions may participate in or intervene in (including the publishing or distributing of statements), any political campaign on behalf of (or in opposition to) any candidate for public office. This prohibition is very broad and strictly interpreted so that seemingly minor innocuous election campaign activities can jeopardize exempt status. Examples of prohibited activity include, but are not limited to, the following: organization of a political action committee ("PAC"); direct or indirect support, financial or otherwise, for

organizations that engage in electioneering or administer PACs where the resources are used for political campaign contributions or PAC administrative expenses; using resources to urge members, staff or others to support or contribute to particular PACs or candidates; organizing or participating in "fund raisers" to support candidates for political office; using resources to provide advice or counseling to candidates or PACs or to organizations that administer PACs. One court even held that an organization had engaged in electioneering because it mentioned in its newsletter the names of certain political candidates who happened to be members of the society and made comments in support of those candidates. Any questions concerning proposed division activity in this area must be directed to APA Office of General Counsel.

Conducting Division Business by Email

APA is organized under the laws of the District of Columbia and by law it and its divisions cannot make decisions in settings other than those in which all of the board members can hear one another speak on the topic to be decided. Therefore, divisions should consider carefully the importance and sensitivity of an issue being decided and use a face-to-face, telephone or web-based meeting for all but the most routine matters. If a vote of the division's executive committee/board of directors is done by email, everyone must vote and unanimous approval is required.

Public Policy Matters

Public Statements

A division may release a position or policy statement on public policy matters in its own field so long as the statement "complies with all relevant association bylaws, rules and current association policies" and the statement does "not establish or enforce standards for ethics, accreditation, certification or credentialing of specialty recognition" (Association Rules 100-1.4). In addition, if the statement is intended or could be construed to establish standards or guidelines for psychologists then Association Rule 30-8 applies.

A division that develops a position or public policy statement in its own field should contact the Division Engagement Office prior to disseminating the statement. The Division Engagement Office will coordinate a review by the Office of the General

Counsel for legal issues and the Government Relations Office for policy considerations. Then, providing there is no conflict, the Office of the General Counsel may create a disclaimer statement that the division will append to the final statement. The disclaimer will make the reader aware that the statement is an official statement of the division and does not represent the position of American Psychological Association or any of its other divisions or subunits.

Amicus Curiae Procedures

APA policy, which covers both APA and/or division participation in court proceedings as *amicus curiae*, requires review by APA Central Office, the Committee on Legal Issues (COLI) and the APA Board of Directors. The division representative, who will act as the division's spokesperson in the review process, should forward all background materials on the case to the APA General Counsel. After Central Office and COLI review, a recommendation will be forwarded to the Board of Directors.

The division referring the case is responsible for costs associated with the review process (legal review and COLI conference calls). However, if after reviewing the case, APA decides that the case is of major significance, costs of the legal review and brief preparation could possibly be covered by APA or the costs could be shared by APA and the division.
The review process is normally completed in 60 to 90 days, but, in cases of critical time importance, it may sometimes be done within a shorter period. See Association Rule 100-1.9 enacted in August 1995.

Prohibition against Electioneering

A division or other unit of the association may not support, either directly or indirectly, any candidate for federal, state, or local office including contributions or other support to any political action committees (Association Rule 100-1.9).

Division Grants and Contracts Activity

The Grants and Contracts Office (GCO) of the Financial Services Department is available to assist divisions in the following areas: preparation of the business and financial portions of grant applications or proposals; post-award administration; financial reporting and invoicing. This office can also assist with the execution of

agreements and legally binding documents coordinating review and approval through the APA Office of General Counsel (see also **Division Legal Activities,** earlier in this chapter). Association Rule 100-1.8 specifies that "A division may execute contracts or negotiate grants with outside entities. Such contracts or grants (with the exception of those for routine, annually recurring events or expenses, e.g., meetings) which provide for payment or receipt by a division or the association of funds, goods, services or other value in excess of $10,000 must be submitted to the APA Executive Office for prior legal and financial review..."

Because of the myriad financial reporting requirements and compliance issues contained in awards from federal sources and APA's ultimate financial responsibility for affiliated divisions, divisions must notify the GCO of any federal awards within 10 days of receipt and provide a copy of the award notification. This information must be collected in order for APA to complete the government-mandated annual audit of all federal assistance received by the association. Successful completion of this audit protects APA's position as a contractor in good standing and maintains the association's, as well as the division's, eligibility to receive federal funds and perform on federally funded projects.

In addition, federal awards require special accounting procedures and must be administered in accordance with applicable statutes and regulations. The penalties for noncompliance are severe, from financial judgments against individuals involved in project management to suspension and disbarment as an eligible federal contractor. The association's GCO is available to advise divisions on appropriate policies, procedures and guidelines to follow when performing on a federal award.

The GCO along with the Convention and Meeting Services Office (CMSO) is also available to assist in the negotiation of function contracts. While these may not meet the $10,000 threshold requiring financial and legal review or are the result of a regularly occurring event, there are numerous financial and logistical advantages to enlisting support. Many hotel and food and beverage contracts contain harsh penalties and one-sided requirements that may not serve the best interests of the division. Due to volume and existing infrastructure, GCO and CMSO staff can frequently obtain better, more balanced terms, limit the liability of the division and the association, and realize significant economies in the expenditure of division funds. For example, it is possible to decrease or eliminate deposits, increase the

allocation of complimentary rooms, reduce room rates, reduce attrition penalties, etc.

GCO can serve as a resource to the divisions through a variety of reference materials that contain specific guidance on the availability, preparation, submission and administration of government-funded grants and contracts. These include the Federal Acquisition Regulations; the Federal Travel Regulation; the Health and Human Services Grants Administration Manual; the Federal Grants Management Handbook; the Public Health Services Grants and Contracts Manual; the Public Health Service Grants Policy Statement; the Federal Supply Class or Service Codes; the Federal Acquisition Report; the National Science Foundation Grants Policy Manual; and a selection of relevant Office of Management and Budget circulars. In addition, we monitor information on regulations, policies, funding sources and program descriptions on various websites and collect the following publications: the Catalogue of Federal Domestic Assistance; the Commerce Business Daily; the Federal Register and the Public Health Service Profiles of Financial Assistance Programs. Other material is available upon request.

Accreditation & Certification Activity

APA Bylaw VI.5 provides that divisions may not establish or enforce standards for ethics, accreditation, certification, or credentialing of specialty recognition. These activities are reserved to APA.

Fundraising

As a federally recognized 501(c)(3) tax-exempt organization, APA must consider a number of conditions and restrictions before engaging in any fundraising activities. This includes its subunits, the divisions, which from time to time may inquire about the possibility of raising funds through online donations, solicitations, direct mailings, etc.

In recent years, many states have enacted stricter rules regarding the solicitation for monies for charities. Accordingly, state attorneys general have been more aggressive in enforcing these laws and pursuing organizations that do not comply. Each state has individual laws governing such solicitations, and each has different requirements for organizational registration, fees and procedures. Unfortunately, there is not a

one-size-fits-all process for registering.

Requests for financial support to individuals — whether asking members or others — raise significant legal concerns. APA is subject to state laws governing charitable solicitation. Beginning in 2018, APA has begun a pilot program for a limited number of divisions to participate in soliciting charitable donations. Interested divisions should contact by email to receive more details.

In terms of giving money to other organizations, APA (and therefore divisions) cannot raise money for activities other than those that advance the charitable mission of the organization. Thus, it is important to determine ahead of time who is sponsoring the event or program, and what its purpose is. An event put on by APA to support an APA program would presumably meet this requirement. However, an event APA wishes to support that is put on by another organization may not. Other organizations, including organizations affiliated with APA, like APASI and the SPTAs, have different rules governing the activities they may engage in. While an activity may be completely appropriate for the organization sponsoring it, it may not be something that APA can appropriately support financially. For instance:

- An event or program run by another 501(c)(3) organization is likely to be acceptable for APA financial support.
- An event or program put on by a 501(c)(6), like APASI or an SPTA, may or may not be appropriate for APA financial support, depending on the event. The purpose of the event/program must be evaluated by the APA Office of General Counsel (OGC).
- APA cannot engage in or fund any political activity.

Questions regarding division fundraising activities should be directed to the

OGC.

Association Professional Liability Insurance

APA maintains association professional liability insurance coverage policy which extends protection to the association, governance members and volunteers for many legal claims that might be brought against APA. The coverage extends not only to APA, but also its divisions (as well as division officers and volunteers acting on the division's behalf). This coverage is provided to divisions at no charge. It should be

noted that the policy is subject to various exclusions, sublimits and deductibles for certain types of claims. Of particular importance is a feature of the policy that requires timely notice to the insurer of claims against the insured. Failure to provide timely notice of claim could jeopardize coverage. If any divisions or their officers become aware of a possible legal claim or if there are any questions in this regard, the APA Office of General Counsel should be contacted immediately. For additional information on insurance coverage, email OGC at apalegal@apa.org.

Establishing a Division

Procedures governing the establishment of a new APA division are contained in APA Bylaws Article VI, Section 3 and Association Rule 100-2. A division may be established whenever one per cent or more of the members of the association petition for it and the Council of Representatives votes to approve it. In this instance "members" of the association are APA members and fellows. Associate and affiliate members are not eligible to sign the petition but they may join the division once established.

Steering Committee's Role

The steering committee for a new division generally consists of a small number of APA members and fellows who develop the written petition (addressed below) for the proposed division, gather signatures, serve as pro tem officers, organize meetings and develop the organization and structure that will be reflected in the proposed bylaws. **The Division Engagement Office assists the steering committee in all facets of the process associated with becoming a division and therefore the first contact with APA should be made with the director of the** Division Engagement Office **as soon as there is a recognized interest in forming a division.**

The steering committee advises APA Central Office, by means of a letter of intent of:

- Its interest in forming a new division.
- Progress towards the formation of a division.
- Evidence of financial and organizational viability.
- Evidence and materials supporting the need for a new division.

A steering committee may send a representative to the annual Division Leadership Conference. An announcement inviting such participation is published annually in

the *APA Monitor in Psychology*.

Petition

A petition for the formation of a new division, submitted in accordance with Article VI, Section 3 of the APA Bylaws, must include in its prefatory statement the following:

- A statement of the proposed name and purpose of the division. • Relevant evidence that the petitioners "represent an active and functionally unitary interest of a group of members."
- The names of the Members sponsoring the petition or speaking for the petitioners.
- A statement that the individual petitioners ask for and will accept membership in the division if it is established.

In considering the petition, council will look for evidence that:

- The area of the proposed division is an active and functionally unitary interest of a group of members.
- Their proposed objectives fall within the scope of those specified in APA Bylaws Article I: Objects.
- Their membership is not restricted on any basis other than psychological interest and qualification.
- The establishment of any new division is not inimical to the welfare of any other division already established.

Collecting Signatures

The petition must be signed by at least one percent of the members (APA members and fellows) of the association. As noted above, only APA members and fellows are eligible to sign a petition for the establishment of a new division.

An APA member who wishes to support the formation of a proposed division may (1) enter his/her name and member number in a designated members-only section of the APA website created for that purpose, or (2) complete a petitioners statement distributed by the steering committee with his/her printed name and written

signature and APA mailing address (to assist in the unambiguous identification of the signers).

In signing the petition an APA member agrees to (1) have a continuing interest in the division, (2) asks for and will accept membership in the division if it is established, and (3) is automatically billed for membership in the division upon its establishment.

Board of Directors' Role

Once the steering committee, working with staff from the Division Engagement Office, perfects the petition, it is forwarded to the Board of Directors. It is the board's duty to determine if the petition conforms to the technical requirements of the bylaws and rules. If the petition is determined to be in order the board will ask that it be circulated with all pertinent supporting information to existing divisions and members of the Council of Representatives. The divisions and Council of Representatives members will be invited to comment in writing to the board.

After the deadline for comments has passed, the board will consider the petition together with supplementary materials and comments. The board will send these materials along with any recommendation it may have to council for its action. If the board's recommendation is unfavorable, the petitioners may be allowed an additional period of one year to perfect the petition, providing there is reasonable evidence that no violence is done to the intent of the original petition.

Council of Representatives' Role

A two-thirds vote of those council members present and voting at the midwinter meeting of council is required for the establishment of a new division. Council will approve a new division as a candidate for a period of two years, during which time the division has all of the privileges of a fully established division. The division is asked to report annually to the Council of Representatives, in accordance with Association Rule 100-1.1, describing its activities during the time of its candidacy. At the end of the candidacy period council will vote on permanent status for the division. (That approval may only be delayed or rescinded if the division does not meet the criteria in the APA Bylaws and the Association Rules for divisional status.) A majority vote is required for final approval.

Following favorable action by council, a new division is constituted when it holds its

first business meeting within a year of its initial approval. During this meeting, the division should adopt the bylaws and elect its initial membership and permanent officers. The secretary of the division is responsible for reporting the substance of these actions to the Division Engagement Office. As noted above, the division will hold candidate status for a period of two years.

Membership in a Newly Established Division

In its first year, a division will have only members because the division leadership will not have had time to develop procedures and criteria for fellow status and because associates and affiliates are not eligible to petition for a new division. Each petitioner has accepted membership in the new division as a result of the agreement they have made in signing the establishing petition.

Dissolution or Sanctions Imposed on Individual Divisions

A division may be dissolved by vote of the Council of Representatives when either (1) the number of members within the division falls below .25 percent of the members of the association, or (2) the division votes to recommend its own dissolution.

The Council of Representatives may also dissolve a division for good and sufficient reason by a two-thirds vote of those present at an annual business meeting, provided that the reason for dissolution is stated in writing by the council to the membership of the division and that the division membership has been given full opportunity to state the reasons for the continued existence of the division.

Association Rule 100-1.3 , enacted in August, 1995, further specifies that "The Board of Directors shall inform divisions of activities that appear to be out of compliance with the Bylaws, Association Rules, or policies of the association. Continued failure or refusal to comply with these requirements may constitute good and sufficient reason for the imposition of sanctions, including dissolution of a division by the Council of Representatives. The board shall seek to resolve issues of concern with divisions on an informal basis before placing the issue on council's action agenda."

Chapter 2: Election of Division Officers and Council Representatives

Division Officers

The APA Bylaws (Article VI, Section 6) require that each division have a president and a secretary. Additional officers, qualifications for officers, and the means by which they are elected or appointed are left to the discretion of the division. The terms of each division's officers are established by the division and reflected in their bylaws.

Eligibility to Serve as a Division Officer

The eligibility of candidates for divisional offices is determined by each division's bylaws. Unless specifically prohibited by divisional bylaws, a person may hold as many offices within divisions to which they have been elected.

Council Representation

Council consists of 183 representatives from divisions, state/provincial/territorial associations, ethnic minority psychological associations and members of the Board of Directors, including the APA officers. The American Psychological Association of Graduate Students also has a representative that serves as a member of Council. Council representatives from divisions and state/provincial/territorial associations are required to be members of the division or state/provincial/territorial associations they represent as well as members of the Association. The number of seats allocated to a division is based on an annual apportionment ballot.

Article V, Section 6 of the APA Bylaws describes the procedures for allocation of council seats. All APA fellows, members and voting associates are sent an apportionment ballot on or before Nov. 1. Each member is allotted ten votes which they can distribute among division(s) and/or state/provincial association(s) according to the individual's interests.

In late December of each year as information is available, the APA Election Committee will announce the results of the apportionment ballot. This information, together with the current membership of council, is the basis for the preparation of nomination and election ballots which are sent to members of council's voting units.

A division or state/provincial association that is allocated fewer seats for one year than those allocated the previous year must recall the appropriate number of representatives. If the division has more than one representative serving on council, it will be the division's responsibility to determine which representative will be

recalled. Once a representative is recalled, the individual's term is over (APA Bylaws Article V, Section 4). Even if the division regains the lost seat on the next apportionment vote, a new election for council representative must be held to fill the seat.

Eligibility to Serve as a Council Representative

Eligibility criteria and procedures governing election of representatives to APA council are contained in the APA Bylaws (Article V) and the Association Rules (Sections 30 & 40). In summary:

- Council representatives must be members of the association. • Council representatives must be members of the division or state associations which they represent.
- No person is eligible to serve as council representative at one time in more than one position or to run for the office of council representative from more than one voting unit.
- "A council member who has served six consecutive years shall not be eligible for election or appointment for a period of one year as a representative from any division, state association or coalition."

In the event that the representative is no longer a member of APA, the division may designate another eligible member as its representative for the remainder of the term. Notice of the election or appointment should be sent to the APA recording secretary.

The APA Council of Representatives urges divisions and state/provincial associations to keep in mind the need for ethnic minority representation when slates for council membership are prepared.

Election Procedures

Each Division determines the manner in which it will elect its officers and which of its membership categories will have voting privileges in the election of officers, with the exception of the division council representative(s), and on other divisional matters. Divisions which restrict their voting privileges to individuals who are also APA members, fellows or voting associates may find it convenient to combine the election of officers with the election of their council representative(s). The ballot for

council representatives is sent in mid-April by APA. It is important to note, however, that only APA fellows, members or voting associates who are members of divisions or state/provincial associations are allowed to nominate and elect their council representatives (APA Bylaws, Article V, Section 5).

Provision of Lists of Candidates to Central Office

Although nominations for division officers and council representatives may be secured in any manner the division chooses, the APA Bylaws require that council representatives be nominated by APA members, fellows or voting associates who belong to the division. In addition, Association Rule (40-1.11) specifies that, unless it is an ex officio appointment, two candidates should appear on the final election ballot for each office of council representative.

The results of the annual apportionment ballot provide the basis for the election ballots that APA sends to members of divisions who are eligible to vote for their divisions' council representative. Under the APA Bylaws, only APA members, fellows or voting associates who also belong to the division are allowed to vote for the division's representative to council.

In order to comply with deadlines prescribed in the Association Rules, each division should submit a list of its candidates for each office to be included on the APA election ballot by Feb. 15. The slate of nominees should be sent to the attention of the Elections Office.

Final Election Ballot

The final election ballot must present at least two candidates for each vacancy for a division's or state or provincial association's representative(s) to the council. If the divisional bylaws do not specify the number of candidates to be placed on the ballot for other division offices, the chair of the nominating committee or secretary/treasurer of the division is responsible for determining the number of candidates needed and the preparation and submission of the slate of candidates.

Divisions will determine eligibility and ask each nominee about his/her willingness to serve. The list of candidates for each office should be submitted in alphabetical order. When the slates are complete (around March 1), a sample ballot, listing the

names to appear on the ballot, is sent to each division elections/nominations chair or secretary/treasurer for confirmation.

The final election ballot is then prepared for division representatives to the council and any other division officers requested by the division. The ballot is sent to APA fellows, members and voting associates, who are members of a division or state/provincial psychological association on or about April 15. The balloting period is 30 days.

Counting and Reporting of Election Results

The results are counted in accordance with a preferential system. No later than July 1, each election committee chair or individual who submitted the slates will be sent a copy of the tabulation for his/her division. In addition, the Election Office sends out emails to all participants in the elections informing them of the results. Newly elected council representatives will also receive such materials as "Making APA Work for You," Association Rules, and the APA Council Representatives Manual.

Around August or January (depending upon officer terms), the division's DEO liaison will send a list of division officers that our records show as current, including position and term dates. Divisions will be required to review and confirm or provide any corrections to this list to ensure APA's records are accurate.

Chapter 3: Raising Issues for Council's Consideration

Direct Division Input

Upon vote of a division, any matter of legislation may brought to the attention of the Council of Representatives (APA Bylaws, Article IV, Section 4).

New Business

Divisions can also place items on the council agenda through new business introduced by their council representative(s). New business presents a motion for action that is not currently before council and may be introduced by a division, state/provincial association or any council representative acting individually. To facilitate the introduction of new business, a form is sent to council representatives prior to both business meetings of council. New business may be sent in, submitted

at the council meeting, or introduced on the floor of council during the meeting.

Boards and Committees

Many of the items on the council's agenda either (1) originate directly from the APA boards and committees or (2) are referred for study and recommendation to APA boards and committees by council (see Chapter 4 for more information). Recommendations for action taken by council are presented along with the recommendation of the Board of Directors, which reviews council's items prior to each council meeting.

Petition of Members

APA members may bring business before council by petition of .5 percent of APA members in good standing. Furthermore, upon petition of 1 percent of APA members, a request for a mail vote upon any matter (except an APA Bylaw amendment) may be addressed to the council.

Chapter 4: Governance Structure

Board & Committee Structure

The APA Bylaws (Article XI, Section 1) state that boards and committees of APA will consist of standing boards and committees provided by the bylaws and other boards and committees that may be established in accordance with the Association Rules. Boards and committees provided by the Association Rules are designated by the term "continuing." Because standing boards and committees are provided by the APA Bylaws, they may be created or dissolved only by vote of the membership. Because continuing boards and committees are established in the Association Rules, they may be created or dissolved only by vote of the Council of Representatives.

APA Boards and Standing committees.

Standing boards and committees report to council through the Board of Directors (see the Policy and Planning Board for an exception). Continuing committees report to their standing parent board (see the Committee on Rural Health for exceptions).

Members of standing boards and committees and those continuing committees that report directly to the Board of Directors and Council of Representatives are elected

by the Council of Representatives (see **Chapter 3**). Appointment of members of continuing committees, ad hoc committees and task forces is the responsibility of the parent board/committee. The Board of Directors has final approval of continuing committee appointments.

Continuing committees deal with important sub-areas of ongoing interest of the parent board. On occasion, a standing board or committee may appoint a time limited ad hoc committee or a task force to undertake a specific mission. The Board of Directors can also appoint a commission to execute an especially urgent short term mission.

Standing boards and committees are required by the APA Bylaws to report annually in writing to the Board of Directors and Council of Representatives. Continuing committees are encouraged to submit annual reports.

Board of Directors

The Board of Directors (APA Bylaws, Article VII, Sections 1, 3 and 4) serves as the administrative agent of the Council of Representatives. Between council business meetings, the Board of Directors has the authority to take actions necessary for the conduct of the association's affairs. If an emergency is declared by a majority of the Board of Directors, the board has the power to take action as though the action were taken by council. The board must report such action to the Council of Representatives at its next meeting.

Policy & Planning Board

P&P is mandated to make recommendations on current and long-term policy of the association and "extensions or restrictions of the functions of the association, its divisions or state associations that are consonant with the purpose of the association." It is unique among boards in that it can either make recommendations directly (1) to the voting members of APA, (2) to the Board of Directors, or (3) to the Council of Representatives (Article XI, Section 7). It is also mandated by the APA Bylaws (1) to report annually by publication to the membership and (2) to review the structure and function of the association as a whole every fifth year and make recommendations by written report to the Council of Representatives.

Chapter 5: APA Membership, Division Membership and Fellow Status

Standards for Election to APA

Members

The minimum standard for election to APA member status in accord with the APA Bylaws (Article II, Section 5) is "receipt of the doctoral degree based in part upon a psychological dissertation or the doctoral degree based on other evidence of proficiency in psychological scholarship from a program primarily psychological in content. The doctoral degree must have been conferred by a graduate or professional school that is regionally accredited or that has achieved such accreditation within five years of the year the doctoral degree was granted or that is one of equivalent standing outside the United States."

Associates

The APA Bylaws (Article II, Section 7) state that "The minimum requirement for acceptance to associate member status shall be (1) completion of at least two years of graduate work in psychology in a regionally accredited graduate or professional school or (2) the master's degree in psychology from a regionally accredited graduate or professional school." Initially, associates may not vote or hold office within the association. After five consecutive years of associate membership, associates achieve voting privileges.

Requirements for election to member or associate status may be waived by the Membership Board in special cases for persons of distinction in fields other than psychology. The requirement of a doctoral degree based in part upon a psychological dissertation may be waived by the Membership Board upon submission of evidence satisfactory to the board of significant contribution or performance in the field of psychology.

Affiliates

The APA Bylaws (Article II, Sections 11-15) allow for the categories of international affiliate, student affiliate (including high school student, undergraduate student and graduate student), high school teacher affiliate and community college teacher

affiliate. International affiliates "shall be psychologists who reside in countries other than the United States or Canada. An individual desiring affiliation with the association must, at the time of application, be a member of the psychological association of the country in which the applicant resides or, if no such association exists, shall present evidence of appropriate qualifications." The APA Bylaws state that affiliates "are not members of the association and … shall not represent themselves as such. They shall have such privileges as may be granted by council, including special rates for subscriptions and publications."

Acceptance to APA

Application forms for APA membership may be obtained from the Membership Department. Completed applications which fulfill the standard criteria are reviewed and approved, while other applications are sent to the APA Membership Board for recommendation.

For current membership categories and further information, please go to the Join APA Webpage.

Standards for Election to a Division

Each division has its own criteria for membership and elects its own members. Divisions specify their membership and affiliation categories and the criteria for each category within their bylaws. Adding new categories and revising or eliminating old categories of membership/affiliation is done through a vote of the division's membership using methods specified in its bylaws.

Anyone belonging to APA may apply for membership in one or more divisions under the rules of eligibility and election established by the division. Almost all divisions use the basic requirements of APA membership and an interest in the issues and activities of the division as the criteria for membership. A few have more stringent requirements. In general, anyone belonging to both APA and a division should have the same category of membership in the division as they have in APA. This holds true for the categories of member, associate and student affiliate. Other APA categories such as international affiliate, high school teacher affiliate and community college teacher affiliate may be tracked by divisions under the more general professional

affiliate category. Most divisions also use the professional affiliate category for professionals who are non-APA members.

Although divisions determine their own qualifications for membership classes, the designation fellow is reserved under APA Bylaws Article VI.2 for members of the division who are fellows of APA (see below) and the designation life member (formerly known as Dues Exempt) is reserved for members who are life members of APA.

Election to a Division

Interested individuals should check divisions' websites for information on how to join the division.

Some divisions have their secretary/treasurer, membership chair or another division member process the applications and payments for new division memberships and affiliations. Others have hired administrative staff to handle this responsibility. Of this latter group, many divisions have signed a memorandum of understanding with APA for Division Engagement to perform this function, and others have hired an individual or firm outside of APA.

Members and Associates

Divisions that do not have the Division Engagement Office handle their membership processing send files to the DEO monthly for processing of memberships and subscriptions for journals published by APA.

Affiliates

Each division that does not have the Division Engagement Office handle its membership processing is responsible for handling its own affiliate memberships and should not report them to the APA Membership Department unless there is a division journal published by APA/EPF. For divisions with a journal published by APA/EPF, names of all individuals who should get the journal should be submitted so that subscriptions can be entered. This applies to all categories of membership and affiliation that receive the journal as a benefit of belonging to the division.

At this time the Membership Department does not track divisions for affiliates for

those divisions that do not have the DEO handle membership processing. Therefore, the division will need to send renewal notices to its affiliates each year, and will need to report the renewing affiliates to the APA Membership Department only if they are to receive an APA/EPF journal. (Note: divisions utilizing the Division Engagement Office for membership processing will not need to send renewals or report affiliates for subscriptions, as Division Engagement will handle this automatically.)
Student affiliates who upgrade to member in APA should inform their divisions so that the divisions can change their membership category and inform the APA Membership Department about their division membership.

Divisions should inform the Division Engagement Office about all categories of membership and affiliation, especially newly created ones. This is usually covered in the annual exchange about membership rates. This information is very helpful in answering inquiries from individuals who identify themselves as division members but do not belong to APA.

Membership in a Newly Established Division

Each petitioner for a new division has accepted membership in the division as a result of the agreement they have made in signing the establishing petition. Because APA associates and affiliates are not eligible to petition for a new division, in its first year, a division will be made up of mostly APA members. There will be no division fellows at that point, because division leadership will need to develop procedures and criteria for fellow status.

Standards for Fellow Status

Fellows shall be members of the association who are interested in the advancement of psychology as a science and as a profession and who have met the requirements described below. The minimum requirements for fellow status are:

- Doctoral degree based in part on a psychological dissertation. • Prior status as a member for at least one year, and nomination by a division to which the member belongs.
- Active engagement in the advancement of psychology.

- Five years of acceptable postdoctoral experience.
- Evidence of unusual and outstanding contribution or performance in the field of psychology.

Fellow status is an honor bestowed upon APA members who have shown evidence of unusual and outstanding contributions or performance in the field of psychology. Fellow status requires that a person's work has had a national impact on the field of psychology beyond a local, state or regional level. A high level of competence or steady and continuing contributions are not sufficient to warrant fellow status. National impact must be demonstrated.

The Fellows Committee's recommendations are based on criteria established by the nominating division, if such criteria exist. In the absence of division criteria, established APA criteria are used. Although there must be a primary nominating division, a second division may submit statements of support for a nominee.

Nominations to initial fellow status are made by APA divisions. Each nominee's application materials are reviewed by the APA Fellows Committee which has the responsibility of making recommendations on each case to the association's Board of Directors and Council of Representatives.

An APA member becomes an APA fellow through a division. Nominations for APA fellow are made through a division of which they are a member and forwarded to the APA Fellows Committee for evaluation. The names of those individuals approved for election to initial fellow status are submitted to the Board of Directors for their recommendation. The Board of Directors then forwards their recommendations to council for election as fellows during their meeting at the annual convention.

The requirement of a doctoral degree in psychology, as defined in Article II, Section 5 of the APA Bylaws, or the requirement of five years of acceptable professional experience subsequent to granting of a doctoral degree, may be waived for fellow status by council upon submission of evidence of outstanding contributions or performance in the field of psychology. In asking for waivers of the technical requirements for fellow status, it is incumbent upon the individuals proposing the waiver to provide reasonably persuasive evidence to support the request. It is not sufficient that such a waiver is simply recommended by a division, nor is it the responsibility of the APA Fellows Committee to develop or to document the case.

Election of Initial Fellows

The procedures for applying for APA fellow status are available on APA's website.

The process to apply to be an APA initial fellow is done via the APA Online Fellows Application Platform. (Please note, you must log in to MyAPA to access the application.) This system allows nominees, endorsers and division fellows chairs to submit all required documents online.
In March of each year, the Fellows Committee carefully considers each fellow nomination and determines whether to:

- recommend nominee election to fellow status;
- not recommend the nominee for fellow status; or
- defer the nomination pending receipt of further information.

Following their preliminary recommendation (usually occurring in March), the Fellows Committee notifies each division fellow chair regarding the status of each of the division's fellow nominees. Should the committee not recommend election to fellow status, the division has the option to inform the nominee and appeal the decision prior to and/or during the APA Annual Convention (the committee holds a special meeting to consider such appeals). Should the committee defer a decision, the division has the option to provide additional information, testimony and clarity regarding the nominee's eligibility for fellow status. The division should keep all information confidential until after council has elected nominees to fellow status.

During the APA Annual Convention, and after all appeals have been considered, the Fellows Committee submits a final list of nominees to the APA Board of Directors. The board then recommends election to the APA Council of Representatives, which ultimately elects the nominees to fellow status. Once the APA Council of Representatives has elected nominees to fellow status, division council representatives can report on the election outcome.

In October of each year, the Fellows Committee officially notifies each division of the outcome, sends a certificate to each initial fellow, lists initial fellows in the *Monitor on Psychology*, the *American Psychologist* and amends their membership record to reflect fellow status.

Individuals who held fellow status in APA before the reorganization of APA in 1945

may remain fellows in APA without division membership. Fellows have the right to later resign from divisions through which they have obtained fellow status.

Election of Current Fellows

Current fellows are APA members who are already fellows in other divisions, and may also become fellows in another division without approval from the APA Fellows Committee. Once an APA member has been approved by the Fellows Committee, Board of Directors and Council of Representatives for fellow status in one division, they do not need further approval from APA to become a fellow in additional divisions. It is the responsibility of each division to determine the eligibility of current fellows and to notify APA of their election.

July 1 is the deadline each year for division fellows chairs to notify the Fellows Committee liaison **with the names and addresses of any new current fellows approved by their division.**

Chapter 6: Division Funds and Financial Services

Dues Statement

The APA dues statement for the following year is sent to all APA members usually in September to be paid by a specified deadline prior to the following year. All division memberships are indicated on this statement and will reflect new divisional membership including: (1) fellows elected to initial APA fellow status through divisions at the previous annual convention business meeting of council, and (2) members, associate members and persons already fellows in APA elected to divisions as reported to the APA Membership Department.

The total amount of division dues is indicated on the APA dues statement. Payment of these will continue membership in divisions.

Payment for joining new divisions cannot be handled through the renewal statement, but can be added through the division membership application

Division Assessments

Division assessments (commonly referred to as dues) of varying amounts are charged by each division and assessment rates for the following membership year are due back to the Division Engagement Office no later than **June 1** each year. In the event that the division does not inform the Division Engagement Office of a new assessment amount, the amount of the previous year's assessment will remain in force and appear on all division members' APA dues statements. The Membership Department requests that any division send an explanatory note for any large increase in the division's division assessment over the previous year, in case a member inquiries about a noticeable change in assessment amounts. (For example, if a new division journal increases the assessment amount, or other such reasons.)

Dues Billing

APA has developed standard procedures for prompting the payment of APA dues. The annual membership dues billing begins in late September. Subsequent renewal reminders are sent regularly and consist of email notifications, hard copy mailings, and a renewal link on MyAPA page. Division memberships are carried over from year to year until the member explicitly resigns from a division by crossing off the division membership and assessment from the annual APA dues statement or contacting the APA Service Center. However, the APA dues billing system is not currently designed to bill members for prior year divisional assessments or dues. (See “Election to a Division” and “ Assessments” in this chapter.)

"Resignation" by Nonpayment of Dues

Under the APA Bylaws (Article XIX, Section 3) nonpayment of dues for two consecutive years is considered equivalent to a request for resignation from the association. During this two-year period, a member retains all membership rights, including voting privileges, but they do not receive his/her member journals (*American Psychologist* and the *Monitor*). Shortly before the end of the two-year period, a final notice is sent as an opportunity for payment of the delinquent dues. If the dues are not paid after this two-year period, the member is dropped from APA membership.

Reinstatement

A member who has resigned voluntarily or through nonpayment of dues, may have

his/her membership reinstated. Individuals interested in reinstatement should write to the Membership Department.

- Full reinstatement requires payment of all delinquent and current dues and re-establishes membership as of the member's initial election date. • Payment of **current** dues and assessments re-establishes membership in APA and any former divisions as of the current year. The period of nonpayment will not be counted in determining eligibility for dues-exempt status. This procedure for reinstatement can be used only once and is not available to
  former members who were under scrutiny by the APA Ethics Committee at the time membership was terminated.

Reapplication

An individual who has been dropped from membership as the result of conduct violating the ethical principles of the association (APA Bylaws, Article II, Section 18), may reapply for membership after five years have elapsed. Members who have been permitted to resign under these conditions may reapply after three years have elapsed. The Ethics Committee considers and makes recommendations to the Membership Committee on all reapplications.

Life Membership Status (Dues Exemption)

Under Association Rule 10-11.1, "any member who has reached the age of 65 and has belonged to APA for a total of 25 years may choose to begin the dues-reduction process, culminating in dues exemption by so advising Central Office of his or her eligibility." Likewise, "any member, who, regardless of age or length of membership, has been adjudged totally and permanently disabled, may choose to become exempt from dues by so advising Central Office of his or her eligibility."

The dues reduction schedule is as follows:

- Step 1 (first year) — 90 percent of regular dues.
- Step 2 (second year) — 70 percent of regular dues.
- Step 3 (third year) — 50 percent of regular dues.
- Step 4 (fourth year) — 30 percent of regular dues.
- Step 5 (fifth year) — full dues exemption.

Life members may order journals at the same low rate as dues paying members. Life members are required to pay a $50 publications and servicing fee if they wish to receive the *Monitor* and *American Psychologist*. When full dues exemption is attained, the subscription price/servicing fee option becomes available.

Association Rule100-6.1 states that "divisions may, at their discretion, assess and collect from these members a mandatory subscription price/service fee to cover the costs of providing such division publications as may be requested by these members." When full dues exemption is reached in APA, the member is exempt from division dues as well. Members pay full division dues until they reach Step 5. The reduced dues for the first through fourth years do not apply for division dues. At Step 5, the member must pay the division publication fee if the division has one and if they want to receive the division publication or publications covered by the fee. More information .

Handling of Division Funds

All funds collected by APA for the divisions are credited to accounts maintained for each division by the division accounting team. Each division must select one of the following two methods of accounting for the funds received.

Method 1

All funds received for membership remit to the division accompanied by a remittance report. The report provides payment date, member name, APA membership number, membership category, and amount. For the Divisions with dues collected are equal to or greater than $100, payments and reports are sent to the Secretary/Treasurer on a monthly basis. For the Divisions with dues collected equal less than $100, payments and reports will be issued once the aggregate is equal to or in excess of $100.

Method 2

APA offers complete accounting services **at no cost** to those divisions that elect to

have APA handle their funds (with the exception of a nominal fee for credit card processing). Funds collected by APA will remain in the division's account **as operating cash and earn interest** until requested by the division to disburse funds. Cash disbursements to pay for expenses must be authorized by the secretary/treasurer (or president, if payment is made to the secretary/treasurer) and must have appropriate documentation attached to the request. APA issues monthly reports to the division. The reports consist of a balance sheet, an income/operating statement and monthly activity reports (cash receipts for dues, other revenue and cash disbursements). For those applicable divisions, the following reports are provided: a budget, investment statement, monthly activity reports of checking and/or savings accounts, and attribute transaction journals for investments not established by APA, travel advances, deposits and other advances, prepaid expenses, and accounts and/or interest receivable.

Additional information for division treasurers is in the Division Treasurer Introductory Information (PDF, 387KB) or contact a Customer Service Representative for the Finance Department.

Auditing of Division Accounts

All division activity is reported on a calendar year basis. The year-end report is provided to each participating secretary/treasurer in the first quarter of the following year. The report includes all activity prior to Dec. 31.

Tax Exempt Status, Annual Financial Report and Tax Returns

Tax Exempt Status

APA and most of its divisions are exempt from federal tax under section 501(c)(3) of the IRC. As such they are required to operate exclusively for charitable, scientific and educational purposes. Before any division undertakes any activity that does not fall under these purposes, it much consult with APA's general counsel.

Annual Financial Reporting

Association Rule 100-1.2, as amended in August 1995, **requires** that divisions include

financial information (including a copy of its annual tax return) in its annual report. For divisions that participate in the group return, the tax return packages provided by the division accounting team in the second quarter will fulfill this requirement when completed. Divisions that prepare their own tax returns are requested to submit copies of the division balance sheet and income statement. All divisions should return this information by early May.

Tax Returns

Divisions that are separately incorporated must apply to the IRS for tax exempt status and are responsible for filing an annual federal tax return. The APA general counsel will provide assistance to the division in this process and also with any applicable state tax issues. Financial services is responsible for filing a group federal return for those divisions which are not separately incorporated. Information included in the division's tax return package is the basis for the preparation of the tax return forms. Completion of the tax package is essential to those divisions included in the group return.

Sales of Division “Swag” Policies and Guidelines

Divisions that utilize APA Accounting must submit detailed information regarding plans to sell any items during the calendar year in which the sales are to be made to the Division Engagement Office by April 29. Divisions that do not utilize APA Accounting are independently responsible for adhering to all federal and state financial regulations. Find more information on the Sales of division “swag” policies and guidelines page.

Chapter 7: Annual Convention

Allocation of Program Hours

Program hours (i.e., program time for symposia, paper sessions, invited addresses and the like) are determined by a formula that takes into account the number of

division members at the time of the most recent convention and the number of division members who attended the last three conventions. All divisions receive a minimum number of program hours. The formula determines the number of additional hours over the minimum allotted a division.

See also **Chapter 10** information on APA convention continuing education activities.

Appointing a Program Chair & Program Planning

Division Program Chairs need to be appointed by Jan. 1 of the year preceding the convention for which they will serve as program chair, i.e., the division program chair for the 2017 convention needs to be appointed by Jan. 1, 2016. Notification of the appointment should be sent to the chair of the APA Board of Convention Affairs at the APA address. The names of these chairs will appear in the list of division program chairs in the call for programs, which is posted on the APA website in September of each year.

The Board of Convention Affairs urges the divisions to consider the possibility of extending the program chair's term to two to three years and appointing a chair elect during the second or third year to assume the duty of chair the following year. The divisions may wish to consider establishing a program committee with rotating membership and chair responsibility, which would provide expertise and continuity in division programming and facilitate interdivisional programming efforts.

Division program chairs will begin their task by attending the “Collaboration and Training Conference for Division Program Chairs,” sponsored by the APA Board of Convention Affairs, in May or June in Washington, D.C. This conference will be an opportunity to network with other program chairs in order to collaborate on programming for the convention.

Beginning in mid-September, the program chair receives information from the APA Board of Convention Affairs on program time allocation, instructions for submitting the division's program to APA and all relevant deadlines. In August at the annual convention the APA Board of Convention Affairs meets with the divisional program chairs for the upcoming year to continue the training and discuss plans for the next convention. All sessions, including business meetings and social hours, must be submitted as a package to the APA Convention/Meetings Services Office for scheduling in the convention hotels by a date determined in late January.

Invitations to Senior Public Officials

Careful coordination is needed in extending annual convention invitations to senior public officials, such as members of Congress, members of the U.S. Cabinet, presidential appointees or high-ranking policy officials. These invitations must be coordinated through APA **before** any inquiries or invitations are issued. The appearance of all such officials carries implications for the convention as a whole: assignment of meeting rooms, accommodations, related food functions and receptions, security, expenses and transportation. Please discuss any plans to involve these individuals with the Convention Office before you proceed. **Please note: In order to insure an appropriate forum, invitations to the president, first lady, vice president, vice president's spouse or former presidents can only be issued by APA.**

To avoid later problems, divisions are advised to very clearly define expense responsibility shared with co-sponsoring groups well in advance of convention.

Staff Availability

The chief executive officer and numerous APA staff are available by invitation to visit division meetings at the annual convention and meetings held in Washington, D.C. to discuss matters of mutual interest. Schedules permitting, staff is available for consultation or informal presentations to your executive committees, business meetings and the like. Arrangements can be made through your Division Engagement account liaison.

Chapter 8: Publications and Communications Activities

Division Journal and Book Policies

The Publications & Communications (P&C) Board acknowledges the value in the diversity of journals and books sponsored by the APA divisions and encourages divisions to pursue publication activities.

The APA Bylaws make divisions a constituent part of APA. Divisions that wish to create a new journal (or take over an existing journal) must obtain formal approval from the Council of Representatives (APA Bylaws, Article V, Section 9). The APA Publishing Program, coordinated by the director of author marketing and business development, will provide information to the division on procedures and required background materials necessary in proposing the creation of, or acquiring, a new journal. Upon submission of the required material, the P&C Board reviews the proposal and subsequently formulates a recommendation for Council's final determination.

For journal publishing arrangements that involve a contract with a non-APA publisher, divisions should provide a draft version of the contract to the APA Office of General Counsel following approval from the APA Council of Representatives and prior to signing. APA's general counsel will provide suggestions regarding the contract, including a legal analysis if such is found necessary. Contracts for books, and particularly book series, should be submitted to the editorial director of the APA Books Program for review, prior to signing.

Management and editing of a division journal is the responsibility of the division. The P&C Board vests responsibility for the journal in the executive committee of that division. The executive committee should maintain and manage their journals in a manner comparable to the way that APA maintains and manages its primary journals, with attention to maintaining high quality and producing clear and transparent publication policies. Each division operating a journal is required to submit an annual report to the P&C Board on its editorial operations comparable to the statements prepared by APA journal editors. This report is requested early in the year by APA Publishing.

Division journals and newsletters are technically APA publications. All APA journals and division journals are required by the council to participate in the APA liability insurance program. Under P&C Board policy, and in line with Association Rule 100-1.4, the divisions, the editor of the publication and APA are covered for judgments concerning libel, or the infringement of rights pertaining to or arising out of privacy, plagiarism, piracy or copyright.

The P&C Board affirms the importance of editorial freedom of division journal editors. Divisions with journals should review the APA Council of Representatives

Freedom of Scientific Inquiry and PublicationFreedom of Scientific Inquiry and Publication (2000). Divisions should also consult their partnering publisher to determine if they will be included in part of any publishing ethics communities by virtue of working with that publisher, such as the Committee on Publication Ethics (COPE).

APA's equity, diversity, and inclusion framework calls on the field of psychology to work toward deconstructing inequalities and inequities that exist within psychological science, including how science is conducted, reported, reviewed, and distributed. To this end, divisions and division journal editors are welcome to use or adapt APA Publishing's EDI Toolkit for Journal Editors to promote inclusive publishing practices in their journals.

All APA resources and expertise are fully available to the divisions that publish with APA Journals. APA Publishing offers a wide range of benefits to our publishing partners, including tailored customer service and unrivaled global reach. We invite you to consider publishing with APA (see 8 Reasons to Partner with APA).

Division Websites, Social Media and Email Distribution Lists

Websites

Divisions may develop their individual websites either with the help of APA or outside of APA as they desire. Each division webpage is linked to APA's home page via the Divisions Web page. Divisions should be aware that the same considerations apply to their Web page as to other printed and published materials they disseminate. Special attention should be paid to issues of copyright infringement, defamation, commercialism and electioneering.

APA hosts more than 25 division websites. To create or update an APA divisions.org website please contact the APA's Web Content Strategy office for more information.

Email Distribution Lists and Social Media Rules

APA/division email distribution lists and social media sites are governed by a set of rules which include prohibitions or cautions for commercialism, copyright

infringement, defamation, antitrust and political campaigning. Divisions are especially cautioned against posting any comments in support of or against a candidate for office on their email distribution lists, Facebook or other social media. This includes comments in support of or against candidates for office and even includes the telling of election-related jokes.

APA has developed rules of use for APA/division email distribution lists and APA Listserv Rules, information on the APA Social Media/Forum Policy and a fuller explanation for its prohibition of commercial postings on email distribution lists and social media sites Commercial Postings on APA/Division web 2.0 (social networking) sites.

Copyright Protection

A work is under copyright protection from the time it is created and fixed in a tangible form, even if the work has not been published or posted. Divisions are advised to include a copyright notice with their published content (e.g., website, newsletter, photos, images, videos, or other content), such as the following: **"© [Year of first publication of the work] Division ## of the American Psychological Association. All Rights Reserved."** The copyright notice informs the public that the content is protected by copyright and owned by the division. Further, it is a signal to the world that the published content cannot be copied or reproduced without the division's permission. Placing a copyright notice on the division's website, newsletter, or any other published content, is a step toward protecting the assets of the division. The notice should be placed on the content in a manner that gives reasonable notice, e.g., on the footer of a website or newsletter. A division may also wish to provide contact information in case an individual wants to seek permission to use copyrighted content. This prevents an individual from claiming that they did not know how to contact the division to request permission prior to use.

Images on Websites

Divisions are cautioned to read the fine print on purchased images used on their websites. Be aware of the conditions surrounding such use and, if possible, buy the rights to use the picture in perpetuity to avoid fines for copyright infringement.

Division Email Distribution Lists Requests

APA accepts requests from divisions to establish email distribution lists (e.g., Listserv®) for use in division-related information exchanges. APA email distribution lists are provided to divisions as a means to communicate with their members about division and APA business and they are governed by rules and restrictions:

To request the creation of a division email distribution lists, a division representative should complete a copy of the APA Division Internet Listserv Request Form. In addition, the division president should send an email of approval for the email distribution lists to the Division Engagement Officeat the same time the request is made. You will need to consider the following points as you complete the request form:

- **Administration of the email distribution list** .
  The list administrator is a person identified by the division who will be listed as the contact for the list, answering questions on subscribing/unsubscribing process, etc. APA Division Engagement will provide training and support for the division list administrator as needed. The division should train a backup person to administer the list in the event of turnover or special administrative needs in the absence of the primary administrator. Lists with no active List owner/administrator, either because of a non-functional email address or an owner that doesn't respond to the subscriber's requests, will be considered abandoned and the division will be asked to provide the email address of a new List owner/administrator who will be responsible for managing the list. Any APA Listserv list without a working List owner/administrator may be deleted from the Listserv server.
- **List subscriptions can be restricted or unrestricted** .
  APA recommends a list owner approved subscription system only. Restricted **(or "Closed")** subscriptions require approval by the list administrator. Sending an email message to "listname"-request@lists.apa.org (Example: APATEST Request@lists.apa.org if the list was named APATEST) will automatically forward a message sent to that address, to the primary list administrator of that list. The list administrator will review the request and add the requester to their list, if appropriate. Unrestricted subscriptions are automatically fulfilled when requested by the subscriber. List administrators can remove a

subscriber from the list. Any list with an "Open" or unrestricted subscription configuration **MUST be moderated** as long as its subscription is set to "Open". "Open" subscription Listserv lists allow anyone on the Internet to subscribed to it, including spammers and users with malicious intent (phishing and viruses,...etc.).

- **List messages can be moderated or unmoderated** .
  A list can have more than one editor and moderator. A moderated list requires that the list moderator review and approve each message to be posted to the list. This is accomplished by the moderator clicking to release the note to the email distribution list. An unmoderated list allows all subscribers to post messages to the list.
- **List archives** .
  Archiving messages exchanged by the list is the responsibility of the division list administrator. All messages successfully posted to a Listserv list are added to that lists archived messages. Those archived messages are available on the Listserv server's web page and are only accessible to subscribers of that specific Listserv list.
- **Welcome message** .
  To protect the division and APA, and limit the liability associated with misuse, a welcome message must be provided for subscribers. A standard welcome message, including required language, is included in the APA Division Internet Listserv Request Form.

APA Division Internet Listserv Request Form

In order to initiate a request for a listserv, or email distribution list through the APA listserv system, please complete the APA Division Listserv Request Form. The administrator of the listserv will need to provide contact information, answer some questions about set-up, agree to a list of responsibilities, review the welcome message for new subscribers, and ask the current division president to send an email approving the listserv to the Division Engagement Office. The administrator will be sent an email notice once the listserv has been created.

Important: APA strives to obtain the highest list subscriber satisfaction for lists that are hosted on APA systems. Our Listserv usage rules review further information

regarding listservs. Accordingly, unless the listserv is an announce-type (moderated) listserv, **we require that potential list members give their consent before being added to any APA hosted list** . All APA Listserv lists are voluntary subscriptions. Regardless of what type of list it is, subscribers should not be bulk added without their consent. If they were already subscribers of a list, they can be bulk added back to that list. Anti-spam laws both, U.S. and international restrict bulk additions and will fine companies and organizations for violating these laws. Instead, the list administrator can send a one-time email to the subscribers (or post to their divisions web page) a link to subscribe to the Listserv list. In addition, each Listserv list must have an easy way to unsubscribe directly from the Listserv list without any restrictions or limitations. There is a default "unsubscribe" footer that each list gets when it's created. If that footer is disabled or deleted, it would violate anti-spam laws.

The list administrator can send a separate message notifying potential subscribers of the existence of the new list with instructions to join. Those potential members can then choose whether or not to join.

For an announce-only, moderated listserv, the division will have someone receiving and reviewing all submissions and approving them to go through or not. The division agrees to limit the emails on the listserv to news and announcements of the division that division leaders want to share with the members as a benefit of membership so as not to overwhelm members with too many messages. If this is the case, then the division may upload new members to the listserv. If so, the division will be responsible for uploading members and for removing any members who make such a request.

Letterheads and Newsletter/Journal Mastheads

In order to conform with the APA ASME Guidelines, division journal and newsletter mastheads should first indicate the name of the publication, including the division name with the secondary reference that it is a "division of the American Psychological Association" following.

APA Archives

The primary purpose of the APA Archives is to collect, maintain, and preserve the

records and information of permanent historical value of the association and its affiliates. The APA Archives works to document the development of the field of psychology in America. It also serves as a research resource for Central Office staff, association members, and qualified researchers.

The early history of APA and its divisions (1917-85) reside in the Manuscript Division of the Library of Congress. While the time span covered is 1917-85, the bulk of the records are concentrated in the period 1940-80. A finding aid listing the materials available in the collection was prepared by the Library of Congress staff and is available in the Manuscript Division Reading Room, James Madison Building, of the Library and online at APA History and Archives.
The APA archivist is responsible for the collection, preservation, and management of all APA Central Office archival materials. The archives assists division officers in the determination of appropriate divisional archival documents and serves as the official repository for said documents.

Archival records are those that have enduring value. Records or materials that are currently in active use are, by definition, not archival records. Division officers should note that materials sent to the APA Archives will always be available for review and use by division officers and members. Division archival materials remain the property of the division. Materials marked confidential will be treated as such and will not be available without special permission. Materials that should be considered archival include materials that reflect the historical growth of the division and/or the division's contribution to the growth of the field of psychology.

Types of materials that should be sent to the APA Archives:

- Minutes of the executive, business and committees' meetings.
- Membership and treasurer's reports.
- Official correspondence sent to the division and the official replies. • Division published materials (books, journals, newsletters, brochures, booklets, posters, online articles, etc.).
- Division's membership meeting or conference call for papers, agenda and minutes, lectures and presentations.
- Award recipients for the current year.
- List of elected fellows for the current year.
- Annual convention, division programming, hospitalities suite program.

- Rosters, membership directories and registers.
- Photographs of division events, officers and members (dated and labeled).

Materials that are not appropriate for the APA Archives are nonhistorical items, such as meeting room schedules, personal items, drafts, email exchange, handwritten notes, blank and duplicate forms, circular instructions and guidance from the APA headquarters, etc. For assistance in determining the archival value of materials, please contact the director of archives.

Divisions should follow these archives procedures:

- A review of archival materials should be conducted by the appropriate officers of the division with assistance, if needed, by the director of archives, (202) 336-5664.
- An Archival Records Inventory Form should be completed for each electronic transmission sent by email to the archives or box of archival materials shipped to the archives.
- Archival materials in electronic format can be emailed as electronic attachments or saved on a CD/DVD and mailed to the APA Archives. • Paper and other materials can be hand-carried to the APA Archives or mailed to:

APA Archives
American Psychological Association
750 First Street, NE
Washington, DC 20002-4242

Materials received will be appraised by the director of archives and entered into the electronic database. A finding aid will be developed from this database. Materials deemed inappropriate for the archives will be returned to the division.

For more information, please contact APA Archives at (202) 336-5664

Archival Inventory Form

To send materials to APA Archives, division officers must complete an Archival Inventory Form (PDF, 20KB) (Word version).

APA Arthur W. Melton Library as Depository for Newsletters and Publications

In 1972, the APA Library was designated as the official APA depository for division and state and provincial psychological association newsletters and other print and electronic publications. Newsletters contain crucial information about the activities and formal structure of each division. In many cases, division newsletters are the only printed source of information about the officers who serve the division. Divisions are asked to mail two hard copies of each newsletter or other material for archiving to the APA library. Divisions that have online newsletters located on their websites are asked to send a cumulative electronic copy to the APA Library at the end of each year.

Arthur W. Melton Library
American Psychological Association
750 First Street, NE
Washington, DC 20002-4242

In addition, there are significant gaps in the Melton Library holdings of division newsletters. It is hoped that division members will respond to this need by filling in the gaps in the holdings, so that this information is available to all members and researchers.

Classic Books in Psychology Program

The APA Archives and library has established a Classic Books in Psychology collection. Contact the director of archives for information about this collection and how you can donate to it.

Division Leaders Listservs

The DIVTRIO has been created to be a resource for the APA Division presidential trios (President, Past-President and President-Elects). This listserv is reserved only to the trios, division admins, CODAPAR members and selected APA staff. CODAPAR will serve to keep the list focused on this purpose and as such, may ask for cooperation of subscribers if the Committee deems certain posts as inappropriate/irrelevant or if particular conversations begin to stray from this intended purpose.

The DIVADMIN was created to be a resource for the APA Division administrative

officers and executive directors, this listserv is reserved for those in these positions and for selected APA and division staff.

The DIVMEM was created to be a resource for the APA Division membership chairs, this listserv is reserved for those in these positions and for selected APA and division staff.
The DIVTREASURERS was created to be a resource for the APA Division treasurers, this listserv is reserved for those in these positions and for selected APA and division staff.

These lists were created in order to facilitate peer-to-peer learning between divisions and for divisions receive announcements from APA Central Office. We encourage you to ask questions of each other that relate to your role as division leaders, to share best practices learned within your divisions, and provide relevant announcements to other division leaders. As announcements come from APA Central Office, we ask that to the extent these are relevant to your division, you help to distribute these within your own division.

Subscribers will be maintained by the Division Engagement Office.

Ideas for the *Monitor*

Divisions may suggest ideas for news and feature articles for the *APA Monitor on Psychology*. Read recent issues to see the types of content that work well in the *Monitor*. Suggestions should include: the topic, what is new or notable about this topic, what psychologists need to know about it, relevant studies, and noted experts on the topic. The editorial team reviews all suggestions but does not guarantee placement. The *Monitor* does not accept unsolicited articles.

Advertising & Division Promotion

Divisions can place advertisements in the *APA Monitor on Psychology* and APA journals at a 20 percent discount off regular advertising rates. Divisions can place advertisements regarding their convention hospitality suites in the convention program at a 50 percent discount off convention program advertising rates.

Division Digest is another avenue to promote Divisions. *Division Digest* is distributed by the APA Division Engagement Office as an email to division leaders and APA staff who work with divisions every other Wednesday. Submit an item by 5 pm on the Thursday before the issue goes out. The submission form includes space to have an event posted to the APA Events Calendar.

Chapter 9: Division Leader and Member Contact Information

Division Officers and Committee Chairs Listings and Change of Address

The Division Engagement Office maintains an overall listing of the names, addresses and telephone numbers pulled from APA and division membership records for division officers and committee chairs. This information is an invaluable resource in referring requests for information from both APA members and Central Office staff, and is the basis for the listing of division officers published in the *Monitor*, the archival issue of the *American Psychologist* and "Making APA Work for You." To relieve the division of the task of contacting several APA offices with information on newly elected officers and committee chairs, Central Office staff have established a line of communication to handle such changes. The Division Engagement Office will contact each division around the time their officers change (usually January or August) to ensure that listings are correct. In addition, division leaders may contact their division engagement liaison or division@apa.org with any questions or changes.

Mailing lists for all APA journals are prepared from the membership records. Change of address may be done through a member's MyAPA page. Please keep in mind that even though an address change may be made in our records within 24 hours of its receipt, most journals are prepared and sent to the printer several weeks in advance of the actual mailing date. Therefore, it may take as many as four weeks before a change of address is effective in the mailing of publications.

For division journals produced independently of APA by outside publishing houses, a division leader will provide the subscriber lists to the publisher. It is helpful to note in the publication's "publisher's mailing statement" at the front of each issue that to ensure a timely change of address, APA members and affiliates can supply change of address through their MyAPA page.

Division Access to Email Addresses

Divisions can access email information for their members who belong to APA and division affiliates (non-APA) members maintained in the APA database. Email addresses must be used for division-related business and are for one-time use. Email addresses may not be given or resold to another user without the permission of the APA CEO or their designee.

Email addresses may not be used for questionnaires, surveys, data gathering or other research purposes. Divisions are free, however, to survey their own members concerning division-related business. In addition, divisions are asked to contact the Center for Workforce Studies when considering research projects about psychology workforce issues.

When compiling a directory of its members, divisions are required to receive permission from members prior to creation of the directory. Please review the next section for further information regarding the production of a directory.

Division Directories

Listed below are a number of considerations that the division should be aware of prior to compiling a directory. The division's directory project coordinator is asked to review the following information and to contact the APA Division Engagement Office at division@apa.org if additional assistance is needed.

Permission/Privacy Considerations

It is important to recognize that information contained on the APA membership database has been provided by the member for publication only in the APA directory or membership register. Therefore, it is important for the division to seek their members' permission to print this information in the division directory (particularly if the member is an EU resident), or probably more practicable, to allow the member an opportunity to deny permission to be included in the division directory.

The division can do this through written correspondence or through an article in its newsletter that alerts the membership to the directory project and allows those members and affiliates who do not wish to be included an opportunity to contact the

directory project coordinator so that their name can be pulled from the list prior to publishing. After the directory is published, members should have the opportunity to withdraw permission to use their information at any time.

Correctness of Information

In order for the information to be as current as possible, divisions are advised that APA files are most up-to-date around March 1. Therefore, it is recommended that divisions pull data from the Division Leaders Data Portal during March-April of the year.

While APA will be the source of some of the information included in the directory, the ultimate responsibility for the correctness of the directory must be the responsibility of the division. Therefore, the division should include a clear statement in the directory that address corrections for APA members are handled through APA, but inquiries as to information contained in the directory and affiliate information should be directed to the division. (Note: Delays between the time the membership listing is obtained from APA and the time the publication is actually printed and mailed can result in bad addresses and confusion on the part of persons who have already reported their address change to APA.)

Legal Precautions

The preparation of a directory or listing of division members is an appropriate endeavor which can benefit the division and its membership. Extreme caution is urged, however, if the division intends to use the directory for commercial purposes, including, for example, by distributing or marketing its directory to consumers of psychological services. Directories or listings, which are directly or by implication designed to generate business or referrals for the psychologists so listed, can have significant legal implications. Divisions that are contemplating the development of such a directory or listing of its members should consult with the APA Office of General Counsel at (202) 336-6079 or SGeneralCounsel@apa.org for further information.

Chapter 10: Other APA Activities Of Interest to Divisions

Continuing Professional Education

APA Office of Continuing Education in Psychology (CEP)

The Office of Continuing Education in Psychology (CEP) provides the resources members need to advance their professional knowledge and skills by offering a wide range of continuing professional education opportunities. The APA CEP Office works closely with the Continuing Education Committee (CEC) to plan and implement continuing education programs at the APA convention and to make policy and program recommendations regarding APA's initiatives related to continuing professional education and training.

In addition, the CEP Office serves as a resource to APA divisions on issues related to continuing professional education, possible one-time CE course approval for programs which divisions may want to offer for CE credit, and program collaborations such as hosting live (in-real time) CE webinars.

APA Annual Convention CE activities

The CEP Office call for CE workshop proposals opens during the fall of each year. We receive approximately 150 workshop submissions, which the CEC rates and reviews. Approximately 50-60 CE workshops on a wide variety of topics are selected to be presented during the APA convention. CE workshops are offered during scheduled convention hours over a four-day period, Wednesday-Saturday, to approximately 1,200 psychologists each year.

The APA CEP Office welcomes CE workshop co-sponsorship collaborations with APA divisions. These workshops are also scheduled during the four-day period. To obtain information about the submission process, divisions may contact the APA CEP Office. In addition to CE workshops, the CEP Office and the CEC sponsors CE credit(s) for selected one- and two-hour sessions offered by APA divisions and APA governance groups. Our goals are to:

- Provide APA members the opportunity to earn CE credit for selected convention sessions.

- Work with APA divisions and governance groups to promote high quality educational programming.
- Highlight outstanding programming offered at the APA convention.

Divisions are responsible for submitting sessions for CE review. The call for CE session consideration is sent to divisions when the call for programs closes. We rely on divisions to submit sessions that meet the APA Standards and Criteria for Approval of Sponsors of Continuing Education for Psychologists, August 2015. The CEP Office offers approximately 150-200 sessions of division and governance programming for CE credit during each convention.

Independent Study Programs

The APA CEP Office also offers a vigorous catalog of independent study programs that allows psychologists to participate in self-directed study. Our article-based, video on-demand recordings and award-winning APA Books® programs are focused on expanding the skills and knowledge of psychologists on a wide variety of topics while offering CE credit. In addition to our independent study programs, we offer other CE opportunities during the year including our live (in-real time) webinar series: Clinician's Corner, Book Nook, Compact Clinical, Interprofessional Continuing Education, Professional Development Training Institutes, and Special Events.

APA Continuing Education Sponsor Approval Office

The Office of CE Sponsor Approval (CESA) was created by APA to facilitate psychologists' access to CE programs. It is the function of CESA to collaborate with the CEC to implement and regulate standards and policies, and to ensure that the highest level of quality is maintained in program planning, management and delivery. The office works in conjunction with the CEC which meets twice per year — each spring and fall — to collectively review the applications received for both renewing sponsors and new applicants seeking to become APA-approved sponsors of continuing education to psychologists.

Currently, there are more than 800 sponsor organizations of continuing education

for psychologists. These organizations have demonstrated their ability to provide highly regarded continuing education programs that adhere to the criteria established by the APA Council of Representatives. APA divisions pay reduced fees when applying for approval and when maintaining their sponsorship.

The APA CE Sponsor Approval Office staff is available at any time to division officers for technical assistance and to answer questions related to continuing professional education.

The American Psychological Foundation

The American Psychological Foundation (APF) is a nonprofit, philanthropic organization which provides grants, scholarships, and awards to individuals and groups in order to advance the science and the practice of psychology for the understanding of behavior and the benefit of human welfare.

Center for Workforce Studies

The primary mission of the Center for Workforce Studies is to collect, analyze, and disseminate information relevant to psychology's labor force and educational system. Divisions are encouraged to contact the office with questions or for additional information at Center for Workforce Studies.

Chapter 11: DEO Calendar

Division Engagement Office

January

- Fellow status becomes effective for newly elected fellows.
- Orientation begins for those who become president-elect in January (continues through December).
- Update officers on division website if officers change in January and update awards as needed. See this article for how awards need to be updated. for how awards need to be updated.

February

- All nominee applications for initial fellow status due.

February 1

- Division annual report due.

Mid-March

- CODAPAR call for nominations due.

May

- Finalize division dues assessments for the next dues year.

June

- Report on recommendation of APA Fellows Committee with respect to initial fellow nominees sent to the division.

June 1

- Final dues assessment form due (for next January-December membership year). No changes after this date.

July 1

- Lists of "current" fellows in divisions due.
- Last month to join for the current membership dues year (July 1 deadline for non-contract divisions to report members).

Mid-July

- Information due from division leaders related to APA annual convention, for example, URL for division program, ribbon orders, and PowerPoint slides, if there will be a booth for divisions.

August

- Council of Representatives elects initial fellows.
- Congratulatory Letters sent to newly elected initial fellows.
- Fellows portal opens for next round of fellow applicants.
- New dues year begins (new members added to January 1 – December 31 of the following year).
- Orientation begins for those who become president-elect in August (continues through July).

- Update officers on division website if officers change in August and update awards as needed. See this article for how awards need to be updated.

September 1

- Deadline for Interdivisional Grant Program applications.

October

- Fellows certificates sent to newly elected initial fellows.
- Schedule A due to APA.

November 1

- Call for division annual reports.

Appendix I: Chronological Calendar of Responsibilities

Note: Presidential trio responsibilities vary across divisions; the timing of activities below may be different for your division.

PRESIDENT-ELECT

First half of the president-elect year

- Read your division's bylaws and, if it has one, officers' manual.
- Determine which appointed positions you will need to fill for your presidential year.
- Appoint a Program Chair for the year in which you will serve as President.
- Review the APA Division Officers' Handbook (https://www.apa.org/about/division/officers/handbook).
- Familiarize yourself with resources on the For Division Leaders page (https://www.apa.org/about/division/officers).
- Meet with current president and past president to get their advice.
- Complete APA Division Leadership online training.
- Begin to plan presidential year Convention programming (invited symposia, addresses, etc.).
- Attend the division's Mid-Winter Meeting
- At Mid-Winter Meeting, present divisional themes for your presidential year and your plan for presidential events for the following year's convention.

- Submit information on presidential year programming to APA upon request.

Second half of the president-elect year

- Appoint liaisons to other divisions and task force and committee chairs to serve during presidential year.
- Attend the division's board and business meetings at Convention.
- Work with Division secretary to plan next year's Mid-Winter Meeting dates, location, schedule, and food.

PRESIDENT

January

- Draft an agenda for Mid-Winter Meeting and circulate to division's executive committee.
- Solicit nominations for APA Boards and Committees from executive committee. ○

Work with the division's Past President to submit division's annual report to APA.

- If your division has a newsletter, plan out when you will write a presidential column for each issue.

February

○ Preside at Mid-Winter Meeting of your division's executive committee. ○ Select meeting date and time for meeting of the division's board at Convention. ○ Select meeting date and time for the division's business meeting at Convention.

○ Check with your Fellows Committee Chair to make sure that all nominee applications for initial fellow status have been submitted.

March

○ Review minutes from the Mid-Winter Meeting as prepared by the division's Secretary.

○ Assist nominations chair in reviewing draft ballot for council representatives and division officers

April

○ Encourage members to vote in APA election for division council representatives and officers and state/provincial association council representatives

June

- Draft agenda for board meeting at Convention and circulate to the board. ○

Draft agenda for business meeting at Convention and circulate to the board. **July**

- Finalize agendas for board and business meetings at Convention and send to board members.
- Email letters of congratulations to all newly elected officers and invite them to the board and business meetings at Convention.

August

- Preside at meeting of your division's executive committee at Convention.
- Preside at your division's business meeting at Convention.
- Preside over events that are part of your Presidential programming (e.g., presidential address, presidential symposium).
- Email letters of congratulation to newly elected initial fellows.

September

- Review minutes from the division meetings at Convention as prepared by the division's Secretary.
- If submitting an Interdivisional Grant Program application, September 1st is the deadline.

December

- Submit division's annual report to APA.
- Submit requests for assistance with meeting space for division pre-convention meetings.

PAST PRESIDENT

Note: These duties are illustrative and may not apply to each division.

- Attend the division's Mid-Winter Meeting.
- Attend the division's board and business meetings at Convention.
- Introduce the current division President for their presidential address or session.

- Chair the division's Committee for Nominations and Elections
    - Determine which elected positions need to be filled this year.
    - 4-5 months before the election, send out a call for nominations and self nominations for open positions.
    - Along with other members of the committee, solicit candidates for all open positions, possibly by consulting division's membership list; seek out diverse representation by sex, career stage, geographic location, field, etc.
    - Ask candidates for candidate statements.
    - Prepare slate for vote by division's executive board.
    - Once approved by the executive board, send the final ballot to APA.
    - Receive results of the election from APA and share with division's President and Secretary.
    - Inform candidates of the election results via email. Let winners know start date for their positions and share bylaws, officers' manual, and any other materials relevant to the role.
    - Announce results on division listserv, website, and newsletter if applicable.
    - Provide the division's Secretary with names and emails addresses of new officers so they ca be added to appropriate websites and listservs.
- Chair the division's Awards Committee
    - A few months before the nomination deadline for each award, circulate a call for nominations via the division listserv, website, and newsletter if applicable.
    - At the deadline, confirm that all necessary materials for the nomination have been received. Contact nominator if anything is missing.
    - Along with other members of the committee, review the nominations and select an awardee. This can be done via email vote or via a zoom call.
    - Present the recommendation(s) of the committee to the division's executive board for their official approval.
    - Inform the award recipient of their selection via email (and possibly by an

emailed letter on division letterhead) and whether there will be an opportunity to receive a plaque in person.

- If there are monetary aspects of the award, ensure that the division's Treasurer sends payment to the awardee(s).
- Ask the division's Secretary to order a plaque for each awardee and arrange for them to be available at Convention.
- Preside at the division's awards ceremony at APA Convention.