

## **APA Division Membership Reports Explained**

The goals of this document are to clarify how the division membership reports work and how memberships and payments are processed. It is directed mainly to membership chairs and administrative officers but should also be helpful to presidents, presidents-elect, treasurers, newsletter and journal editors, listserv managers, and other division officers and committee chairs.

The Division Services Office emails membership reports to each division monthly. The reports are sent to the membership chair, president, and treasurer for the contract divisions (those that hire the Division Services Office to handle their membership processing and/or other central office functions) and to the designated person for each non-contract division (administrative officer, membership chair, etc.). (See the attached list of contract divisions and sections and non-contract divisions.) We also send reports for the sections.

### **Overview**

There are two membership reports, "Paid Division Memberships Report" or "Summary" (see attached Item A) and "Paid Division Detail Memberships Report" or "Detail" (see attached Item B). The first report, the Summary, shows new and renewed membership counts and dollar figures for the month and year and the final counts and dollars for the previous year. The second report, the Detail, gives name, contact information, dues dollars paid, and other details for each new and renewed membership for the month.

After APA convention, we begin processing memberships for the coming year, so shortly after this time, you will begin to see reports for both years and you will continue to get reports for both years as long as there is activity for both. If there is no activity during a month, no reports will be sent.

The information in the reports comes from the finance side of the APA database so that it can include accurate dollar figures. Information Technology Services (ITS) set up the reports, which include formulas and references to APA accounting codes to pull the appropriate information for the reporting period. CBIZ, the company that APA Finance hired to handle division accounting, closes and balances the books for the month. The Division Services Office then runs the reports and emails them to the division contacts. Reports are typically emailed around the middle to end of each month for the PREVIOUS month.

### **History**

The goal with the reports was to have one form that would show membership counts and dollar figures in one place and report on membership, finances, and publications in a consistent way over time and to all divisions. The reports are complex and are difficult to simplify further because of the many issues involved, such as various membership categories (member, associate, student affiliate, etc.), new versus continuing, paid versus unpaid, publications, life status (formerly called dues exempt), publication fees, etc. Before these versions of the membership reports were created in 2003, there were complaints from the divisions that membership counts and dollar figures did not match and were not accurate. Counts and revenue were given on different reports – counts on a report to the membership chair and revenue on a report to the treasurer. A membership chair might multiply the number of memberships by the fees that "should" be collected and get one total, while the treasurer would see a different dollar figure on accounting reports. This was because the membership counts were coming from the membership side of the database, which did not record actual dollar figures collected, only number of memberships, and dollar figures were coming from the finance side of the database.

It's not as simple as multiplying counts by fees because people sometimes overpay or underpay, pay various rates for different categories of membership, cancel memberships, etc. Timing of

processing varies between the membership and finance sides of the database, as different offices handle membership and finance, but all processing figures should match pretty closely once a year is completed.

Staff from three offices of APA worked together to create the reports – Finance, ITS, and Division Services. The Finance Office set up the coding that determines how memberships show up for much of the report, for example, as a new student affiliate or continuing student affiliate. ITS set up the format of the reports and programmed the reports to pull the information into the correct columns and rows. The Division Services Office coordinated the revision of the reports and worked with the other offices to respond to the needs of the divisions.

## **Membership Types**

Anyone who belongs to APA who desires to join a division should join the division in the same category or type of membership. The major APA membership categories are Member, Associate, Fellow, Life Status (formerly called Dues Exempt), Student Affiliate, and International Affiliate.

A Member must have a doctoral degree in psychology or a related field. An Associate holds a master's degree or 2 years of graduate study in psychology or a related field. Fellow status is an honor bestowed on an APA Member who has shown evidence of unusual and outstanding contributions or performance in the field of psychology. One is first elected as a Fellow of APA through a division. This is the "Initial Fellow" process. The person will become a Fellow of both APA and the nominating division at the same time. One may then become a Fellow in other divisions through the "Current Fellow" process. Fellows of APA who want to join a division should apply to the division as a Member.

When someone has reached the age of 65 and has belonged to APA for 25 years, they qualify to begin the process of becoming Life Status in APA. Once the process is begun, dues are reduced over a period of 5 years, until finally there are no dues and the only fees are publication fees (to receive the *Monitor* and the *American Psychologist*). Once a person is fully Life Status in APA, they qualify to become Life Status in their divisions (there are no steps or various levels of Life Status in the divisions). Some divisions require publication fees in order to receive the journal and/or newsletter of the division and some do not. Whether paying publication fees or not, Life Status members are considered to have valid, legitimate division memberships with all rights and privileges, including the right to vote and hold office in the division.

Student Affiliates are graduate or undergraduate students taking courses in psychology. International Affiliates are psychologists living outside the United States. In most cases, divisions allow students and those outside the U.S. to join in these categories whether they hold membership in APA or not.

In addition, most divisions have the category of Professional Affiliate for anyone who does not belong to APA but wishes to join the division. This category is also used for anyone outside of the U.S. if the division does not have the International Affiliate category. If someone wants to resign from APA but continue with the division, they can do this as a Professional Affiliate if the division has the category. They need to send a signed letter of resignation to the APA Membership Office and then contact the division to pay the fees as a Professional Affiliate.

Please see the APA Membership website for detailed information: [www.apa.org/membership](http://www.apa.org/membership).

## **How Memberships Get Recorded**

Each division must have someone to receive and process applications and payments for all new memberships and for renewals for Student Affiliates, International Affiliates, and Professional Affiliates. This person should report division memberships for APA Members, Associates, Fellows, and Life Status to the APA Membership Office. If this is done, division membership renewal fees will be included on the APA renewal notices sent out by APA in the fall for the next year, subscriptions to any division journals published by APA/EPF will be entered, and divisions will be listed in the online directory. They should also report Affiliate memberships – both new and renewal – if there is a division journal published by APA/EPF and if Affiliates should receive the journal – so that subscriptions (not memberships) may be recorded. The APA Membership Office does NOT track division memberships for Student Affiliates, International Affiliates, Professional Affiliates, or any other Affiliate categories and does NOT track any section memberships. They will not record memberships, will not send renewal notices for membership or subscription, and will not list them in the online directory.

In addition, this person should report all memberships and payments to CBIZ if the division's accounting is handled by APA Finance and CBIZ so that payments will be credited to the division's accounts.

Divisions that have hired the Division Services Office to track these memberships are called "contract divisions." If Division Services is processing a division's memberships, it is receiving applications, recording memberships, reporting them to APA Membership and Subscriptions, passing them along to CBIZ for recording of payments, and reporting on membership processing to the division's membership chair. (We provide membership reports to all the divisions, not just contract divisions.) In addition, for contract divisions, the Division Services Office sends out welcome messages at the end of each month, sends out information and applications to interested parties (division interest mailings, i.e., sending information to those who request it through the APA membership packets and website), handles address changes, sends out and processes renewals for affiliate categories, and answers questions. Our fees are \$18.00 per hour.

The membership period is always January 1 through December 31. We enter applications for the current year until around convention time. After that, we start applying them to the next year. This is the way APA memberships and subscriptions work (although APA does not send back issues for the *American Psychologist*, *Monitor*, or *gradPSYCH*). If there is an APA/EPF journal associated with the division, back issue labels are usually generated twice a month. It can take 4-8 weeks for subscribers to get back issues domestically and up to 12 weeks internationally. Often they will receive the next live issue before the back issues. If there is a division journal published by someone other than APA, we provide back issue labels to the publisher along with each set of labels for a new issue, so that anyone added since the last issue came out will get missing issues. We do not send back issues of newsletters.

For both journals and newsletters associated with contract divisions, we usually "grace" members with the first issue of the next year after their membership year, that is, provide the first issue of the year to everyone who paid for the year before, assuming that everyone will eventually renew their membership. Many people do not renew in time for first issues and this saves having to send many back issues.

## **Paid Division Memberships Report (Summary)**

A1. The Paid Division Membership Report (or Summary) shows new and renewed membership counts and dollar figures for the month and year and the final counts and dollars for the previous year. At the top of each Summary – see Item A and see numbers to correspond to the numbered paragraphs here – is the title, date, division number and name, dues year being reported, reporting period, and membership types and fees.

A2. The first column is membership level or type. The next three headings, with each broken into columns for counts and dollars, are:

A3. Current month.

A4. Cumulative for the current year.

A5. Final for the previous year.

A6. Under the heading "Via APA Statements" on the left, all of these sections are for memberships through the APA dues statements (renewals for members, associates, fellows, and life status who have paid publication fees for a non-APA/EPF journal or a newsletter or 0 if not). This reporting is based on the processing activity of the APA Membership Office, not CBIZ. All categories are listed as continuing because the APA membership office does NOT take payments for any NEW division memberships (although once memberships for the categories of member, associate, fellow, or life status are reported to them, they bill the people for the division on the subsequent year's renewal notice). Note that this includes no data for sections within divisions since the APA membership office does not track memberships for sections (sections are not included on renewal notices from the APA Membership Office for renewal of APA and division memberships).

A7. The next part, "Via Division or Div Svcs," is for memberships coming in through the divisions themselves and NOT handled by the APA Membership Office (new members and associates and new and continuing – also known as renewing or renewal – affiliates, including professional affiliates, student affiliates, international affiliates, and any other affiliate categories as appropriate depending on the division).

The data in this part are based on how the Finance Office has set up codes for membership category and payment. For the contract divisions, these memberships are first recorded in the membership side of the database by the Division Services Office and then forwarded to CBIZ for recording in the finance records as determined by the membership records that Division Services has created (but note that Finance does not break Affiliates and International Affiliates into new and continuing as the Division Services Office does and note that they do not break any categories into new and continuing for any sections as the Division Services Office does). For the non-contract divisions, these memberships are first recorded by someone outside of APA who is appointed by the division and then forwarded to CBIZ for processing of the payments based on the information that is reported on cash receipt forms which are completed by the division. Non-contract divisions must also report any new memberships for members, associates, fellows, and life status to the APA membership office to ensure that division memberships are added to the individuals' APA membership records.

A8. Grand totals for the month, current year, and previous year are included under these two sections.

A9. For your reference, the line "Life Status Membership Total" has been added next. It includes all life status for your division, whether there are publication fees or not and if there are, whether people have paid them or not. This number does NOT come from the finance side of the database. This is the only way it can be reported since the finance side only reflects payments (not \$0 payments). The number of life status in the top cumulative section reflects only those who have paid your division's publication fees (it will be 0 if your division does not have publication fees for life status). You may want to use this line near the bottom rather than the number above for reporting as even those life status who have not paid publication fees are considered active members of your division.

A10. If your division has an APA or EPF journal, those data will appear next. The DUEX figure is the number of life status who are getting the journal. The DIV figure is the number of division

members, associates, and fellows who are getting the journal. The line below that is the total. These numbers are NOT from the finance side of the database.

There are some important notes to keep in mind while working with the membership reports.

First, minor differences may exist between the paid dues amounts on this report and the revenues reported on the division's financial statements. Differences may be caused by membership adjustments, returned checks or disputed credit card items, and timing differences based on when funds are recorded.

Second, if numbers are included in the "Special" rows, they may be for new Life Status memberships.

Finally, free memberships and unpaid or non-renewed members and affiliates (other than life status who have not paid publication fees) are NOT included on these reports. This is because the reports are coming from the finance side of the database, where only transactions with money associated with them are recorded. We provide lists of resignations and deaths quarterly, around January 1, April 1, July 1, and October 1. We can provide a list of unpaids anytime you would like.

### **Paid Division Detail Memberships Report (Detail)**

B1. The Paid Division Detail Memberships Report (or Detail) gives name, contact information, dues dollars paid, and other details for each new and renewed membership for the month. At the top of the Detail report – see Item B and see numbered items to correspond to the numbered paragraphs here – are the title, division number, dues year, and reporting period.

B2. For each individual, there is ID number, name, address, phone, fax, email, date (date that transaction was recorded), member type, whether new, and amount (net amount recorded for this member during the current accounting period). The information in this Detail report corresponds to that in the earlier Summary report so that for each line where a number is reported for the current month, there is a section of names in the Detail report. For example, looking at the member type column in the sample detail report and following along in the monthly count column in the summary report, there are 4 continuing fellows, 4 continuing members, 1 affiliate, 1 continuing member, 2 new members, and 9 new students.

The Detail is NOT a cumulative list of all the memberships, only those processed during the month of the report. If you want a cumulative or current list, labels, or electronic file of division memberships anytime, please contact me (allow one to two weeks for ITS to run the request). These are provided free of charge to any division officer or chair for division business when the reason for the request and a sample of any mailing are provided.

### **More Information**

Please visit our website, [www.apa.org/about/division.html](http://www.apa.org/about/division.html), for more information, such as membership applications, publication dates, awards, meetings, calendars, demographics, the Division Officers Handbook, and the *APA/Division Dialogue* newsletter. Contact Keith Cooke at [division@apa.org](mailto:division@apa.org) or 202-216-7602 if you have any questions.