

Policy & Planning Board (P&P) Recommendations for Maximizing Liaison Relationships

Executive Summary

Having heard from other boards and committees (B/Cs) via the P&P self-study process that the role and process of determining liaisons are not clear, P&P has reviewed multiple sources of information to provide some recommendations for consistency of assignment, involvement, and recognition of liaisons across governance. This document outlines reasons for formal liaison relationships between governance groups, the role of liaisons, and the responsibility of the involved parties. In addition, P&P recommends determining processes for establishing liaison relationships, managing interactions during meetings, and formalizing language regarding liaisons within operating procedures manuals for each board and committee. This document is intended to clarify possible actions for creating smooth and useful interactions with liaisons.

Purpose

While many groups note the importance of liaison relationships, there are no established practices across the Association providing an informative framework to support the utilization of these connections. P&P has reviewed several extant sources of information regarding liaisons and effective governance such as:

- Data provided in B/C self-assessment reports
- Several B/C operating procedures documents
- Survey data from APA staff liaisons
- The Report of the Work Group to Evaluate the Future of the Work of Governance and Volunteer Leadership (2021)

Why Create Liaison Relationships?

For any group, these relationships may involve both accepting liaisons and sending a liaison. These relationships can provide for:

- Improved communication and advocacy
- Information transfer between groups (one-way or bidirectional)
- Identification of related interests, activities, and synergies
- Relationship building
- Coordination and/or collaboration on matters of joint interest
- Greater efficiency and transparency throughout APA

How does a B/C Determine their Liaison Relationships?

Each year, the incoming B/C leaders should discuss their upcoming priorities and consider what other groups might share a common purpose, possess helpful expertise, or should participate in consultation and discussion. B/C chairs should consult with their respective B/C APA staff liaison regarding the history of accepting and sending liaisons and what has been successful in the past.

During discussion and evaluation, determine:

- What are the goals/purpose of liaising with this group in particular?
- Is this relationship built out of habit or necessity?
- Is communication with this group needed ad hoc or on a long term basis?
- If long term, is a liaison invited to join, or would a liaison be sent to the other group?
- Would it be sufficient to just send the agenda and meeting minutes with follow-up conversations as needed?
- If the liaison will attend meetings, will they attend all meetings or only those where relevant content will be discussed?

Some groups currently have other relationships with labels like “monitor” or “observer.” P&P suggests that much of what is accomplished by these types of relationships may not require an official designation. In fact, B/C meetings are open to all APA members (with some exceptions related to items that take place executive session) enabling informal and time-limited opportunities for discussion and consultation.

How do Liaisons Participate in Meetings?

The ways in which liaisons engage with other groups has changed with the shift to virtual and hybrid meetings. With the dramatic increase in frequency of virtual meetings, liaisons may be more easily able to attend routine meetings throughout the year which could greatly increase the value of these relationships. The virtual format also changes the dynamics of participation making it more difficult to manage participation boundaries given the lack of physical and other cues.

While each liaison arrangement will vary, some common expectations are as follows:

Chair’s responsibilities:

- Ensure liaisons are provided relevant information, especially if they are not included on the group’s listserv
- Optimize liaison relationships efficiently and effectively to APA’s benefit
- Set clear expectations of frequency of liaison input and involvement in meetings, as needed

Liaison’s responsibilities:

- Know the primary issues and be familiar with the agenda of the host group
- Be prepared to communicate relevant information to the host group and ask questions pertinent to the interests of the liaison’s parent group
- Communicate back to parent group in a timely fashion

Recommendations for Establishing and Utilizing Liaison Relationships

Conduct Annual Liaison Negotiations

Liaison relationships tend to be more useful and beneficial when they are actively negotiated and discussed, ensuring the liaison, hosting Chair, and relevant APA staff liaisons are clear about the goals of the relationship. P&P suggests every B/C initiate an annual review process to consider and arrange liaison relationships, allowing for greater clarity and an environment in which initiating and ending relationships is based on mutual need and shared goals rather than just history, habit, or inertia. This transparent approach may allow for more strategic thinking about collaboration including opportunities to encourage engagement with groups that may not enjoy the same level of political clout but have a great deal to offer in terms of collaboration. Also keep in mind that liaison relationships are but one mechanism for communication between groups.

Consider Implications of Liaison Relationships on Group Functioning

Along with the opportunities presented by establishing liaison relationships, they can produce some conflicts with regard to time management and group process. Each B/C is encouraged to have explicit discussion to consider and manage expectations related to liaison engagement, both in receiving a liaison and sending one to another group. For example, this might involve limiting the frequency of attending meetings or attending only relevant portions.

Adopt Language for B/C Operating Procedures

Given that B/C composition and chairpersonship changes frequently, it can be helpful to establish consistency from year to year by including a statement on liaisons in each B/C's Operating Procedures.

P&P recommends that documentation regarding liaisons includes, at a minimum, the following:

- Description of how liaisons are assigned and accepted
- The contact person for questions and requests (i.e. staff liaison, chair)
- Operating procedures in regard to liaison participation in meetings (e.g., speaking order)

Distribute Information to New B/C Chairs

P&P recommends that this document be distributed to all new B/C chairs on an annual basis during Elected and Appointed Leader (ELA) onboarding. P&P is available to offer a brief orientation regarding liaison relationships and ongoing consultation as requested.

Seek Advice and Support from APA Staff Liaisons

APA staff liaisons are an extremely important resource on this topic. They provide consistency to B/C operations year upon year and are well-positioned to advise chairs on the liaison process.

P&P is open to feedback on ways to strengthen this document. Please direct comments or questions to P&P's APA Staff Liaison, Abby Green, at agreen@apa.org