

Policy and Planning Board Annual Report to the Membership for 2024

Every year it is the responsibility of the Policy and Planning Board to report to the membership regarding their activities during that year and their observations regarding how the APA as an organization has been functioning. From its inception in 1946 through 2015, this report was published in the *American Psychologist*. It is now posted on the Association's website. Below, you will find a general description of our work for the year and a comment to members at the end.

Meetings and Membership

The Policy and Planning Board (P&P) held monthly virtual meetings and met in person during the Spring Consolidated Meeting for two days in March of 2024 and at a day-long virtual Fall Consolidated Meeting in September 2024. In addition, the P&P Executive Committee, composed of the Chair-Elect, Chair, and Past Chairs, met monthly.

The members of P&P Board for 2024 were: Eric Russ, PhD (Chair); Tammy Hughes, PhD (Chair-Elect); Peter Sheras, PhD, ABPP, LCP; Georgia Chao, PhD; Blanka Angyal, PhD; Alette Cobble Temple, PsyD; Antonio E. Puente, PhD; Randall White, PhD and Rebecca Boswell, Ph.D.

We thank the liaisons and APA staff who contributed meaningfully to P&P this year. We want to especially thank Dr. Debra Kawahara from the Board of Directors and Dr. Jason Cantone from the Committee for the Advancement of General Applied Psychology, who made particularly impactful contributions to our work. We also want to thank Dr. Peter Smith from the Council of Representatives. While P&P continues to have concerns that the pilot program as structured - assigning council liaisons to various boards and committees - is not the most effective way to connect Council to Boards, we have appreciated Dr. Smith's willingness to engage with us. P&P also wants to thank APA General Counsel Deanne Ottaviano for her guidance and advice throughout the year.

Five-Year Policy Review

Per APA Rule 30-9.2 regarding the Council Policy Manual, P&P is tasked with notifying responsible groups of their obligation to review all policies within the Council Policy Manual every 5 years. The [2023 P&P annual report](#) describes the process. The Council vote was delayed longer than anticipated, and the policy review was passed by the

Council in August 2024. We discuss the delay below and offer recommendations from lessons learned for P&P and other groups about increasing collaboration across the association.

Closer collaboration between Council and Boards and Committees

At the beginning of our policy review process, it was clear that most Boards and Committees needed to be made aware of the policies they are responsible for maintaining.

Recommendation: That Council includes the Board or Committee responsible for maintaining that policy in the NBI.

Recommendation: That Boards and Committees review all policies they are responsible for when orienting new members.

Additionally, part of the delay in our own Council item came because while P&P has been working with Boards and Committees for over a year, we needed to sufficiently include Council in that process. When the Council Leadership Team (CLT) received the item, they had additional questions for Boards and Committees to address. We have seen this experience occur across multiple groups as groups frequently work for 1-2 years on an item for Council to be met with questions and input from people seeing it for the first time. In our conversations, it became immediately apparent to both groups that the P&P and CLT needed to work more closely together. Particularly as it related to items that would come before Council, ongoing dialogue would make the process easier on both sides. While interpersonal communication should be a strong suit for an organization of psychologists, we often need more training. Working mainly virtually should encourage more communication among chairs and leaders generally.

Recommendation: Leadership teams from Policy and Planning Board and Council Leadership Team should meet regularly (semi-annually or quarterly) to discuss alignment on association goals across Council and Boards and Committees.

The challenges between P&P and CLT with this item also emerged between Council and other Boards and Committees. This emerged both in soliciting input from Boards and Committees as items were being developed and in requests for feedback with quick turnaround times as items are brought to Council.

Recommendation: As a general matter, Council items should be developed in collaboration with Boards and Committees with relevant expertise. This should be a proactive process during development as additional subject matter experts,

not just as reviewers of completed items. Additionally, reviewing boards and committees should be given at least 60 days to fully review items and have an opportunity to provide additional comments on new drafts.

Recommendation: CLT and P&P should work collaboratively to develop a document that details this process.

Organizational Complexity and Organizational Change

Since 2020 P&P reports address organizational and governance change in various ways. This conversation can be traced through multiple threads to at least 1960, with the most recent being in the 1990s-- the Blue Ribbon Panel. We owe much of the history and organization of this discussion to past P&P Chair, Dr. Deirdre Knapp. A significant challenge in these discussions is a need for alignment among APA elected and appointed leaders on the path forward, which creates distrust at the idea of winning and losing. We experienced this in our efforts to increase the effectiveness of Council, and this came up again in response to the recently announced staff reorganization. As a result of the inability to enact structural changes, our elected and appointed leadership has continued to grow through the expansion of task forces, workgroups, and standing boards and committees. We have challenges with communication and information dissemination across boards and committees, taskforces, workgroups, and even Council, who create many of these groups in APA policy. Additionally, the continued expansion of elected and appointed leadership groups means an increased demand on staff for support. Given our current structure and sense of power within APA being zero-sum, closing or ending a group is a complex or nearly impossible task.

Recommendation: Council seeks out subject matter experts starting with the standing boards and committees about emerging policy needs.

The other challenge that emerges from organizational complexity is the challenge in evolving or updating structures. The Board of Directors, Council, Council Leadership Team, and the Policy and Planning Board all have various responsibilities for the structure and function of the organization. Practically, this has made work such as updating bylaws, sunseting committees or modernizing structure difficult or impossible. In some ways, APA elected and appointed leadership has become like the DSM. Most agree it has problems, but deciding on alternative approaches is challenging.

Recommendation: Council and the Board of Directors should consider what a process to reform APA elected and appointed leadership that is inclusive would look like. As with the strategic plan, input from all groups is critical.

Self-Study

As P&P has considered our role in addressing the organizational issues described above, we have tried to think about how we can be most helpful in advancing the mission of APA. One aspect we have emphasized over the past several years is as a consultant to the groups with whom we interface. As part of that role, elected and appointed leadership groups must engage in regular self-reflection. Previous P&P annual reports detailed the rationale and process for creating a self-study process for Boards and Committees. While this effort fell off due to challenges around COVID, we have worked to revive and standardize this process.

The Policy & Planning Board prepared questions to assess Board and Committee functioning in three key domains: (a) Mission, (b) Operations, and (c) Impact. We believe that these assessments will be useful for looking back at the previous 3-5 years and reflecting on ways to maximize each elected and appointed leadership group's future ability to advance APA's strategic plan.

Groups will be notified to complete the self-study process in December, the year before the review. Self-studies will be returned to P&P by August of the year of review. We strongly encourage groups to use the survey results as a point of discussion. Responses will be compiled and given to the board or committee chair. We encourage all groups to review their most recent self-study as part of their orientation to new members. The Policy and Planning Board will also review responses to inform their work, advising the broader organization on organizational needs, gaps in training, or additional support. Groups are noted as Year 1 or Year 2 in Appendix A. Generally, we tried to have committees complete the process in Year 1 so that parent boards could use that information in their review. A review of self-study activity will be incorporated into the Policy and Planning Board's long-term plans. As an example, our next 5 years will include the following tasks:

- 2025- Yr 1 Self-Study
- 5-year Organizational Review
- 2026- Yr 2 Self-Study
- 2027- Review Self-Study Activity
- 2028- 5 Year Policy Review
- 2029- Yr 1 Self-Study
- 2030- Y2 Self-Study
- 5-year Organizational review

Final Comment to the Membership

While P&P will engage next year in a more comprehensive assessment of the overall functioning of the Association in its role as an entity responsible for periodically reflecting on governance structure and function, we offer some reflections based on the issues described above. In many ways, APA continues to be a strong organization. The most unambiguous indication of this is that membership is growing, and there is clear engagement across the association. We continue to impact policy and weigh in on important issues of the day. However, as we face challenges ahead, including financial headwinds, continued evolution toward a multi-tiered profession that embraces our master's colleagues, and significant uncertainty about the impact of the recent federal election on healthcare and psychology, it is essential that APA is structured in a way to engage in these issues entirely. We observe the problems of trust, power, and communication as emergent from APA's organizational complexity. If we are to ever succeed with organizational change, we will need more collaboration and communication across leadership groups. This will be important to address divisions and wounds that have evolved.

As members of the Policy and Planning Board, we are all proud APA members who care deeply about our profession and APA. We look forward to continuing to serve APA and APA members through honest and direct feedback about the functioning of APA elected and appointed leadership.

Appendix A

Board of Directors (Yr 2)
Finance Committee (Yr 2)
Ethics Committee (Yr 2)
Advocacy Coordinating Committee (Yr 2)
Committee on Division/APA Relations (Yr 2)
Committee on Early Career Psychologists (Yr 2)
Committee on International Relations in Psychology (Yr 2)
 American Psychological Association of Graduate Students Committee (Yr 2)
 Committee on the Advancement of General Applied Psychology (Yr 2)
Council Leadership Team (Yr 2)
Policy & Planning Board (Yr 2)
Board of Scientific Affairs (Yr2)
Committee on Psychological Tests and Assessment (Yr 1)
Committee on Animal Research and Ethics (Yr 1)

Committee on Human Research (Yr 1)
Board of Professional Affairs (Yr 2)
Committee on Professional Practice and Standards (Yr 1)
Committee on Rural Health (Yr 1)
Board for the Advancement of Psychology in the Public Interest (Yr 2)
Committee on Aging (Yr 1)
Committee on Children, Youth, and Families (Yr 1)
Committee on Disability Issues in Psychology (Yr 1)
Committee on Ethnic Minority Affairs (Yr 1)
Committee on Sexual Orientation and Gender Diversity (Yr 1)
Committee on Socioeconomic Status (Yr 1)
Committee on Women in Psychology (Yr 1)
Ad hoc Committee on Health Equity (Yr 1)
Publications & Communications Board (Yr 2)
Board of Educational Affairs (Yr 2)
Committee on Associate and Baccalaureate Education (Yr 1)
Teachers of Psychology in Secondary Schools (Yr 1)
Board of Convention Affairs (Yr 2)
Membership Board (Yr 2)