

# **Handbook for Affiliated Chapters of the Association for Behavior Analysis International**

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## INTRODUCTION

The mission of the Association for Behavior Analysis International (ABAI) is to contribute to the well-being of society by developing, enhancing, and supporting the growth and vitality of the science of behavior analysis through research, education, and practice. ABAI affiliated chapters share this mission in the geographic areas of their reach.

This handbook is intended to provide guidance to both new and well-established affiliated chapters as well as those interested in creating chapters. Included in the handbook are guidelines for the formation of chapters and the nature of the relationship between chapters and ABAI. In 2018, ABAI had 93 affiliated chapters, 51 in the USA and 42 outside the USA. Appendix A includes a list of all ABAI affiliated chapters.

## CHAPTER FORMATION AND DISCONTINUATION

### Affiliated Chapter Formation

Any group of 10 or more active ABAI members in a discrete, definable location may apply to establish a chapter, provided that another chapter of the same type does not already exist. Chapters are one of four types: national, state/provincial, regional, or local. National and state/provincial chapters are defined by the legal boundaries of their areas, and ABAI restricts new national and state/provincial chapters to those countries and states/provinces where no other national or state/provincial ABAI affiliated chapter exists. Local chapters may be similarly restricted, as appropriate.

All chapters are required to state clearly their geographic boundaries in their bylaws and printed and web publications. It is also required that chapters include in their names a reference to their geographic boundaries (e.g., Four Corners Association for Behavior Analysis, New Zealand ABA, Mid-American ABA).

All ABAI affiliated chapters are expected to:

- Share the mission of ABAI.
- Submit a brief annual report to the Executive Council by April 1 each year, updating on officers, recent events and activities, and goals and plans for the coming year. See Appendix D for an outline of the data and other information you will be asked to update on an annual basis.
- Contribute annually to an issue of *Inside Behavior Analysis*, to inform ABAI members of work in the field and to promote activities.
- Organize an annual business meeting to conduct the business of the chapter and allow input from chapter members. ABAI provides space for this purpose at its annual convention, and will include notice of the meeting in the convention program and on the ABAI website.
- Link their websites to the ABAI website.
- Comply with the policies and guidelines defined in this handbook.

If you are interested in forming a new affiliated chapter, please submit a completed application form, bylaws, a copy of the most recent issue of the chapter's publication (if applicable), and the signatures of 10 **current ABAI members** who support the formation of the chapter (the person making the application can be one of the signatories). The Affiliated Chapters Board provides initial review of applications and materials and makes recommendations to the Executive Council, which meets twice a year.

The 10 signatories must all have at least a master's degree and live and/or work in the area to be served by the proposed chapter. If any signatory does not live within the geographic boundaries of the chapter, justification must be given for why that person's signature should be included in the application. Signatures may be faxed or mailed, or they may be sent from the individual email addresses of the signatories, each with a simple line to the effect of, "I support the formation of XX chapter."

Part of the review of chapter applications will be consideration of whether the area to be served will be able to support a chapter. Analysis of population, infrastructure, and other characteristics may be made, and applicants may be asked to supply further information.

Deadlines for receipt of the application materials are April 1 for the spring council meeting and September 1 for the fall council meeting. The application is on the ABAI website at

<http://www.abainternational.org/constituents/chapters/chapter-application.aspx>.

### **Discontinuation of Chapters**

On occasion, a chapter may become inactive. The dissolution of a chapter may arise either as a decision of the chapter membership or from insufficient interest or support. Notification of withdrawal should be made in writing to the ABAI Executive Council and to all chapter members. In addition, the dissolution of a chapter may arise from a decision of the Executive Council upon recognition that the chapter has not provided an annual report for two consecutive years or has otherwise demonstrated inactivity. After the first year of failure to report to the council, a chapter will be put on probation. If the chapter does not provide an annual report for two consecutive years, its affiliation with ABAI will be terminated. These decisions are not made lightly and occur after a period of investigation, discussion, and deliberation.

### **GUIDELINES ON CHAPTER ACTIVITIES, ADMINISTRATION, AND OPERATIONS**

Every affiliated chapter is different in size and type of organization, and ABAI respects the choices each chapter makes regarding its own administration. Some chapters have a few members and meet only at the ABAI convention. Others engage in multiple activities, such as conducting an annual conference, collecting fees, and distributing newsletters. The following guidelines and policies have been developed to clarify the role of chapters in the association.

### **Legal Status of Chapters**

Chapters are typically organized as membership organizations. Chapters have substantial leeway in how they serve their members' needs. If a U.S.A. chapter wants to incorporate as an organization to align with the mission of ABAI, it could do so as a charitable organization. Outside the USA, chapters might incorporate based on the regulations of their respective countries. ABAI does not recognize for-profit organizations as affiliated chapters.

Chapters may choose to incorporate in order to protect assets, officers, and others working on behalf of the chapter. If a chapter is not incorporated, some type of liability coverage is recommended, to protect against personal liability in the event of legal action against the chapter, such as for issues related to contracts or injuries at events.

Chapters affiliated with ABAI may affiliate with other organizations, as long as their missions are compatible with ABAI's. ABAI has the right to accept, reject, or rescind affiliation status based on incompatible chapter affiliations.

### ***IRS Return for Tax Exempt Organizations (Form 990)***

In the USA, the Internal Revenue Service (IRS) requires filing Form 990 for tax exempt organizations and recommends having various policies as a sign of good corporate governance; although these are not *required* by law, chapters are recommended to have the following policies—which can be useful for chapters outside the United States as well:

- *Minutes Preparation.* Defines the chapter's procedures for recording, reviewing, and accepting minutes. The minutes are distributed for review to all board members before the following meeting. Members have the opportunity to accept minutes as written, accept them upon revision, or reject them. Minutes are approved upon a vote of the board of directors.

- *Review IRS Form 990 or Other Tax Documents.* Describes the process by which the board of directors reviews, requests revisions of, and approves tax reporting information prior to submission to the relevant government agency.
- *Conflict of Interest.* Defines the requirements for full disclosure by chapter board members and other interested parties to ensure that decisions are free of favoritism and in the best interests of the chapter.
- *Whistleblower.* Provides for the protection of chapter employees, independent contractors, officers, or board members who, in good faith, make confidential reports of suspected violations of law or policy.
- *Document Retention and Destruction.* Outlines rules and schedules for the retention and destruction of documents to prevent the unauthorized destruction of documents that may be needed to establish fraud or wrongdoing.
- *Expense Reimbursement.* Defines the conditions under which board and committee members and employees are reimbursed for expenses incurred while performing the duties of the chapter.
- *Gift Acceptance.* Describes the conditions within which gifts may be made to and accepted by the chapter.

The American Society of Association Executives (ASAE) has draft policy statements that can be reviewed and tailored to fit the needs of chapters. ASAE members can find these policies at <http://www.asaecenter.org/PublicationsResources/modelslist.cfm?ItemNumber=37862>. Other sources for sample Form 990 policies may be found by searching the web.

### **Bylaws**

Each chapter is encouraged to develop and operate within bylaws. Bylaws provide structure and continuity to the administration of any organization and provide transparency for leadership, membership, and management. A bylaws template is provided in Appendix C.

### **Article and Annual Report to the ABAI Executive Council**

All chapters are asked to submit an article once annually to update the ABAI membership on chapter activities and accomplishments. Both the article and the chapter's annual report are due (together) to the ABAI Executive Council by April 1 each year. The article and report serve to describe the chapter's activities and issues of concern and provide relevant data about the chapter. An outline of a typical annual report is included as Appendix D. Chapter liaisons will be prompted when it is time for the report and will also receive updates and correspondence on behalf of the ABAI council. Chapter data can be found in Appendix E.

### **Officers**

Each chapter should set its own policies and procedures for electing or appointing officers. An officer structure including a president, president-elect, past president, and secretary-treasurer is recommended for consistency; these can be interim officers for new chapters if the expectation is to hold elections after chapter approval. (Also, it is understood that newly formed chapters will not have past presidents or presidents-elect in place.) The officers usually constitute the executive committee of the board. Additional representative types may be appropriate for chapter constituencies, including student, applied, and experimental representatives. Information concerning chapter officers should be included in the annual report to the ABAI Executive Council.

### **Financial Management**

Dues and fees are collected at the discretion of each chapter, and money generated stays with the chapter and is used to cover expenses (such as newsletters, seminars, and social events). If a chapter charges dues, it has a responsibility to maintain sound financial procedures and make regular financial reports to its members. ABAI is not involved in the financial oversight of chapters, and chapters are not required to make

financial reports to ABAI. Some basic recommendations for financial management are included in Appendix F.

### **Leadership**

ABAI expects that the leadership of chapters, however structured, will promote basic principles of good governance, due diligence, and care in the oversight and management of chapter operations. Chapters, like ABAI, are membership organizations and as such are expected to employ democratic principles in their management. ABAI relies on and reflects the positions of its members; we hold a similar expectation of chapters and require that ABAI chapters also reflect the positions and needs of their membership.

### **Membership**

Chapters are free to establish membership structures to best suit their needs. ABAI does not require that chapter members be members of ABAI, although it does encourage it. Full members of ABAI are eligible to participate in the nomination and election of ABAI officers. Requirements of Full membership are available on the ABAI website: <https://www.abainternational.org/membership/full-members.aspx>.

#### ***Chapter/Adjunct Membership***

A special membership category, Chapter/Adjunct, was established for members of ABAI affiliated chapters. Chapter/Adjunct members receive (1) a subscription to *Inside Behavior Analysis* and other mailings and email notifications and (2) reduced registration rates for ABAI events (lower than nonmembers). *Perspectives on Behavior Science* is NOT included in this membership category and must be ordered separately. Applications for ABAI Chapter/Adjunct membership must include evidence of chapter membership. Here is a link to further information:

<http://www.abainternational.org/membership/chapteradjunct-members.aspx>.

### **Communication**

Each chapter should have an established method to keep its members informed of activities, upcoming elections, and other important information. Such information can be distributed via a newsletter, email messages, a website, social media accounts, and/or at chapter business meetings.

### **Position Statements and Public Policy Positions**

ABAI's policy regarding position statements of chapters is driven by ABAI bylaws. Statements of official position on societal, professional, and other issues can be issued on behalf of ABAI only if such positions have been approved by a vote of Full members of ABAI. Members of chapters, like members of ABAI (including Executive Council members), cannot make public statements on behalf of ABAI.

If a chapter wishes to issue statements or guidelines, these must include a disclaimer stating that they do not reflect the position of ABAI, its Executive Council, or its members. If a chapter issues a position statement or guideline, the ABAI office and Executive Council must be informed in writing before the document is disseminated. ABAI should receive a copy of the document with the disclaimer for its files.

On occasion, a chapter may craft a position statement that is relevant to the field as a whole and to all ABAI members. If the position is one that warrants consideration as an ABAI position, the procedure is as follows: (1) a draft position is proposed in writing to the ABAI Executive Council for approval to convene an ad hoc task force; (2) the council decides whether the appointment of a task force is warranted and, if so, invites members to serve on the task force; (3) the task force reviews or further develops the position and presents it to the council for consideration; (4) upon council approval, the draft position is presented to the Full members of ABAI for commentary; (5) a third draft is made, with consideration of Full member commentary, and presented again to the ABAI council, which then decides whether to put the position to a vote of the Full members of ABAI.

## **Diversity Policy**

Chapters are expected to operate in alignment with the ABAI diversity policy:

The Association for Behavior Analysis International encourages diversity and inclusiveness in the field of behavior analysis broadly, and within the organization specifically. Diversity refers to differences in race, ethnicity, sexual orientation, gender identity, age, country of origin, religious or spiritual beliefs, ability, and social and economic class.

## **ABAI SERVICES TO AFFILIATED CHAPTERS**

The ABAI office and Affiliated Chapters Board Coordinator serve as liaisons between chapter officers and the ABAI Executive Council. The office sends regular correspondence to chapter officers with updates on chapter activities, news, upcoming events, and more. Advice and consultation are available for initiatives such as recruiting new members, maintaining a mailing list, preparing a newsletter, and coordinating events. The following are some of the services that ABAI offers its chapters.

### **Chapter Leadership Seminars/Orientation**

ABAI hosts chapter leadership seminars, typically during its annual convention. These sessions are designed for chapter officers who are newly elected and for those continuing in their leadership positions. At each session, important information is distributed and the working connections between chapters, the council, and ABAI's office are described. Time is provided for questions and discussion. Chapter officers are highly encouraged to attend these leadership seminars in order to learn, to share, and to gain an understanding of the benefits of relationships across chapters.

### **Clearinghouse Services**

The ABAI office functions as a repository of chapter information, bylaws, and other pertinent items. To that end, chapter officers are strongly urged to forward copies of chapter documents to the office for safe-keeping and historical continuity. The ABAI office will also file key documents that chapters are willing to share with other chapters, such as bylaws, handbooks, etc.

### **Web**

The ABAI website is <http://www.abainternational.org>. From here, visitors can apply for membership; register for events; access event programs, calls for papers, journal information, and more; and view affiliated chapters' contact information, websites, email links, and other details.

ABAI provides space on its website for an informational page about each chapter. The pages link from <http://www.abainternational.org/constituents/chapters/chapters-home.aspx>. ABAI includes the following information on its website as provided by each chapter:

- Chapter mission/objectives and contact information/social media and web links
- Description of membership
- Annual or recurring events
- Publications/newsletters and subscription details
- Information specific to chapter of interest to behavior analysts
- Chapter membership and event registration forms (MS Word or .pdf files)

ABAI would like your chapter to include similar information on your website concerning ABAI.

ABAI collects information from chapters through the annual reports provided to the Executive Council. Chapters may also contact ABAI at any time at [mail@abainternational.org](mailto:mail@abainternational.org) with updates to their web pages.

## **Outreach and Networking**

### ***Business Meetings***

Chapters are expected to hold, at minimum, annual meetings for their members. ABAI will schedule and provide space at the annual convention, without charge, for affiliated chapters to conduct business meetings. If you are interested in organizing a meeting, please follow the submission procedures for business meetings in the ABAI annual convention call for papers, which is available online September 1. Additionally, the convention offers a variety of events relevant to chapters, including ABAI board and committee meetings.

### ***ABAI Expo***

The Expo is ABAI's opening exhibition at the annual convention. It provides a forum for chapters; special interest groups; and academic, clinical, and research programs to communicate with convention attendees. Several thousand people pass through the Expo, making it a prime venue for chapters to share promotional information, answer questions from attendees, network with colleagues, and recruit new members. ABAI provides complimentary space and strongly encourages all chapters to participate. Expo submission forms are included in the annual convention call for papers.

From time to time, ABAI may also be able to send representatives to chapter events.

### ***Promotional Emails***

In order to assist in advertising events and other initiatives sponsored by chapters, ABAI will exchange emails. Interested chapters should send a text email, subject line, return address, and deadline for emailing (please give us some lead time, as emails usually cannot be sent the day they are received). In the spirit of reciprocity, ABAI will also ask chapters to help us spread the word to their members about events, news, or other opportunities available through ABAI. ABAI's email policy for chapters is as follows:

- Two email invitations will be sent annually to chapters inviting them to submit an email announcement.
  - The audience for any given email is limited to those who have indicated interest in receiving information about a particular chapter on their ABAI membership forms.
  - Chapters are limited to two emails annually.
  - Should a chapter wish to send more than two emails in one year, ABAI may send additional emails, on a case-by-case basis, for a reasonable fee.
  - Emailing will be reciprocal—ABAI to provide an email to be distributed to chapter mailing lists, to promote ABAI, at the same time it sends emails on behalf of chapters.
- The ABAI email list, in part or in its entirety, will not be distributed to any group.
- ABAI's content policy is as follows:

ABAI is interested in supporting the communications of its chapters, and therefore reserves the right to edit chapter emails for style and content. Any substantive content changes will be sent back to appropriate chapter leaders for approval. Emails sent on behalf of chapters by ABAI are intended to be informational and promotional. Specifically, ABAI does not send chapter emails that:

  - Impugn chapter leaders, members, or ABAI in any way.
  - Contradict ABAI positions or policies.
  - Attempt to resolve internal chapter conflicts or controversies.
  - Are otherwise deemed likely to cause offense to ABAI and/or chapter members, as determined by ABAI.



### ***Member Publication***

*Inside Behavior Analysis* (IBA) is published three times annually and provides an opportunity for chapters to share their activities with ABAI members. ABAI provides space for any chapter wishing to contribute an article, conference information, or other chapter-related news. Articles accompanying chapters' annual reports (due April 1) to the Executive Council appear in an issue each year.

Additionally, from time to time chapters express an interest in reproducing an article from IBA in their newsletters. ABAI will permit the use of articles in this manner, but we ask that you first email the ABAI office and indicate the chapter's interest in reprinting a published article. Chapters are requested to identify the source of any article reprinted from an ABAI publication. We would like to distribute basic information about ABAI for inclusion in chapters' publications as well.

### ***Chapter Listserv***

ABAI has a chapter listserv ([All-Chapters@abainternational.org](mailto:All-Chapters@abainternational.org)) to encourage and support networking among chapters. The email addresses of two officers from each chapter can be added to the listserv.

### ***Continuing Education***

ABAI is approved by the American Psychological Association (APA) to offer continuing education (CE) credit for psychologists, by the Behavior Analyst Certification Board (BACB) to offer CE credit for certified behavior analysts, and by a few other organizations as well. The main goal of CE is to keep knowledge and skills current; in order to provide such opportunities, ABAI offers CE events throughout the year and will also co-sponsor APA CE events with other organizations or individuals. Chapters interested in co-sponsoring workshops should contact the ABAI office for more information.

At its annual convention, ABAI offers workshops and other sessions for credit. These cover a variety of topics and range from introductory to advanced-level content.

## APPENDIX A: CHAPTERS OF ABAI

Chapter information is at <http://www.abainternational.org/constituents/chapters/chapters-home.aspx>.

### U.S.A. Chapters (as of August 2018)

Alabama ABA  
Alaska ABA  
Arizona ABA  
Arkansas ABA  
Behavior Analysis Association of Michigan  
Behavior Analysis Association of Mississippi  
Berkshire Assoc. for Behavior Analysis and Therapy  
California ABA  
Colorado ABA  
Connecticut ABA  
Delaware ABA  
District of Columbia ABA  
Florida ABA  
Four Corners ABA  
Georgia ABA  
Hawai'i ABA  
Heartland ABA  
Hoosier ABA  
Illinois ABA  
Iowa ABA  
Kansas ABA  
Kentucky ABA  
Lone Star ABA  
Louisiana Behavior Analysis Association  
Maryland ABA  
Massachusetts ABA  
Mid-American ABA  
Minnesota Northland ABA  
Missouri ABA  
Montana ABA  
Nebraska ABA  
Nevada ABA  
New Hampshire ABA  
New Jersey ABA  
New York State ABA  
North Carolina ABA  
Ohio ABA  
Oregon ABA  
Pennsylvania ABA  
Philadelphia Metropolitan ABA  
Rhode Island ABA  
South Carolina ABA  
Southeastern ABA  
Tennessee ABA  
Texas ABA  
Utah ABA  
Vermont ABA  
Virginia ABA  
Washington ABA  
West Virginia Behavior Analysis Association  
Wisconsin ABA

### Non-U.S.A. Chapters (as of August 2018)

ABA Australia  
ABA Colombia  
ABA España  
ABA Germany  
ABA India  
ABA Lebanon  
ABA of Brazil  
ABA of Italy (IESCUM)  
ABA Saudi Arabia  
ABA Switzerland  
ABA Turkey  
Alberta ABA  
Association for the Advancement of Radical Behavior Analysis  
Association Française—Les Professionnels de l'Analyse du Comportement  
Atlantic Provinces ABA  
Australian Association for Cognitive Behaviour Therapy  
Behaviour Analysis in Ireland  
Bermuda ABA  
British Columbia ABA  
Central China ABA  
Chinese ABA  
Experimental Analysis of Behaviour Group UK and Europe  
French ABA  
Hong Kong ABA  
Icelandic ABA  
Israel ABA  
Japanese ABA  
Jordanian ABA  
Kenya ABA  
Korean ABA  
Korean Association of Child and Adolescent Behavior Therapy  
Manitoba ABA  
New Zealand ABA  
Norwegian ABA  
Ontario ABA  
Philippines ABA  
Polish Association of Behavioral Therapy  
Polish Society for Behavioral Psychology  
Québec ABA  
Sociedad Mexicana de Análisis de la Conducta  
Swedish ABA  
Taiwan ABA

## **APPENDIX B: GUIDELINES, REQUIREMENTS, AND PROCESS FOR ESTABLISHING A NEW CHAPTER**

To establish a chapter, applicants must submit:

- A completed application form online at <http://www.abainternational.org/constituents/chapters/chapter-application.aspx>.
- The signatures of at least 10 current ABAI members who support the formation of the chapter, all of whom must have at least a master's degree and live in the area to be served by the chapter (if any signatory does not live in the area to be served, a justification must be made as to why that person should be included as a signatory).
- A copy of the most recent issue of the chapter's publication (if applicable).
- A copy of the chapter bylaws. A bylaws template is included in this handbook in Appendix C and here: [https://www.abainternational.org/media/97762/abai\\_affiliated\\_chapter\\_bylaws\\_template\\_2015.docx](https://www.abainternational.org/media/97762/abai_affiliated_chapter_bylaws_template_2015.docx).

Note: The bylaws template must be adhered to closely. Failure to take into consideration language in the bylaws template may lead to rejection of the affiliated chapter application, and an explanation should be provided if the proposed bylaws deviate from the template.

Send application materials to [mail@abainternational.org](mailto:mail@abainternational.org). An application checklist may be found here: [https://www.abainternational.org/media/97755/chapter\\_application\\_checklist.pdf](https://www.abainternational.org/media/97755/chapter_application_checklist.pdf).

### **Application Submission Dates**

Applications for affiliated chapter status are reviewed twice each year by the ABAI Affiliated Chapters Board and the Executive Council. Those received by April 1 will be reviewed at the May meeting. Applications for review at the fall council meeting should be received by September 1.

**APPENDIX C: ABAI AFFILIATED CHAPTER BYLAWS TEMPLATE** [THIS TEMPLATE MUST BE ADHERED TO CLOSELY. FAILURE TO TAKE INTO CONSIDERATION LANGUAGE IN THE BYLAWS TEMPLATE MAY LEAD TO REJECTION OF THE AFFILIATED CHAPTER APPLICATION; AN EXPLANATION SHOULD BE PROVIDED IF THE PROPOSED BYLAWS DEVIATE FROM THE TEMPLATE.]

Bylaws of the [XXX Association for Behavior Analysis] (Insert full name of the chapter.)

**Article I—Name**

The name of this organization shall be the [XXX Association for Behavior Analysis]. [XXX ABA] is a not-for-profit membership organization whose purpose is to promote the specific interests of its members, within the scope of these bylaws.

**Article II—Purpose**

The [XXX Association for Behavior Analysis] was created with the mission to XXX [Insert the mission or purpose for which the chapter was formed, explicitly encompassing all aspects of and domains within behavior analysis—research, practice, etc.]. Specifically, the organization shall:

- (a) Serve as a scientific and professional reference and networking group for its members.
- (b) Disseminate information to promote its mission to a wider audience.
- (c) Organize an annual business meeting to provide a forum for discussion of the affairs of the chapter.

**Article III—Membership**

***1. Categories of Membership***

Membership is open to all persons interested in or actively engaged in behavior analysis. [Membership must include all types of behavior analysts and not be limited to, for instance, practitioners or researchers.] Membership shall be in one of three classes:

Full Member: Any individual holding a graduate degree in a discipline directly related to or involving behavior analysis and whose professional commitment includes teaching, research, and/or practice in behavior analysis may apply for membership in this category. Full members may vote on membership decisions of the chapter.

Affiliate Member: Any member evidencing interest in the discipline of behavior analysis, but lacking graduate-level formal training therein, may apply for this class of membership.

Student Member: Any individual pursuing formal training in the discipline of behavior analysis but not yet gainfully employed therein on at least a half-time basis may apply for membership in this category. Such application must be accompanied by documentation certifying the applicant's student status.

Membership is by the calendar year.

A person wishing to become a member must submit a completed application form and pay the annual membership dues established by the executive committee. Applicants shall also submit any additional information, such as transcripts, diplomas, or references, as requested to verify they meet the requirements for membership.

The executive committee, by a two-thirds majority vote, may suspend or expel any member for cause after appropriate notice and hearing. By a two-thirds majority vote, the committee may also reinstate a former member on such terms as it deems appropriate.

## ***2. Voting***

Full members in good standing shall be entitled to one vote on all matters brought before the chapter. There shall be no proxy voting.

## **Article IV—Officers**

### ***1. Officers***

The officers of the [XXX Association for Behavior Analysis] shall be [for example] the president, the president-elect, the past president, and the secretary-treasurer. [It is recommended that at least two officers be Full members of ABAI.]

### ***2. Terms of Office***

The term of office of the president shall be one year to commence at the conclusion of the meeting presided over by the current president, who shall then assume the office of past president. The president and past president shall not be eligible for nomination for the office of president-elect.

The secretary-treasurer shall be appointed by the board for an initial term of three years; this appointment may be renewed as deemed appropriate by the board. During the year prior to assuming office, the designated replacement for the office of secretary-treasurer may attend any or all board or committee meetings.

### ***3. Duties***

The president shall preside at all board and member meetings. The president also is responsible for the counting of nomination and election ballots, as well as the ballots in any referenda submitted to the voting membership, and shall exercise general supervision over the affairs of the chapter.

If the president is unable to preside over a meeting, that responsibility shall fall to the past president. If he or she is unable to preside, the president-elect shall assume the responsibility.

The secretary-treasurer is a non-voting member of the executive committee and shall attend all of the meetings. The secretary-treasurer shall keep the records of the chapter and the board; conduct official correspondence; serve ex officio as a member of all committees as deemed necessary by the board and issue programs of meetings; and receive applications for membership and give notice of all inductions into membership.

The secretary-treasurer shall have the responsibility for all chapter funds and shall have authority to disburse these funds for purposes authorized by the board. The secretary-treasurer shall keep a record of all money received and all disbursements made and submit an annual report of the chapter's financial status.

The secretary-treasurer shall act as the general executive officer of the chapter in consultation with and by direction of the president and the board. He or she shall bring to the attention of the board and the members such matters as are deemed necessary for the appropriate operation of the organization.

### ***4. Replacement***

In the event of death, incapacity, or resignation of any of these officers, the board shall, by majority vote, appoint a successor to serve until the conclusion of the term of the replaced member.

Any officer may be removed at any time by vote of a majority of members entitled to vote.

## **Article V—Executive Committee and Board**

### ***1. Composition***

There shall be an executive committee consisting of the president, president-elect, past president, and secretary-treasurer. The board shall consist of the executive committee and at least three additional members at large elected for staggered three-year terms. None of the officers shall serve simultaneously as members at large of the board.

The board shall promulgate policies regarding chapter functioning that are not specified in the bylaws.

### ***2. Meetings***

The board shall meet at least once annually at a time and location deemed appropriate by the president. A meeting of the board may also be called by action of three members of the board who shall notify the remaining members at least two weeks in advance of the proposed meeting, though in an emergency the two weeks' requirement may be waived.

Records of meetings and board activities shall be permanently retained.

### ***3. Quorum***

For purposes of transacting the business of the chapter, a quorum shall consist of four members of the board. Board members may attend meetings remotely (e.g., via Skype).

### ***4. Removal and Replacement***

Members of the board who fail to maintain membership in good standing in the chapter or who fail to attend two consecutive meetings of the board are subject to removal by a majority vote of the remaining members of the board; a board member who has missed two consecutive meetings will be given opportunity to provide explanation for the absences. A tie-vote shall be construed as affirmation for removal. Positions vacated for any reason shall be replaced by a majority vote of the remaining members, such successors to serve until elections occur at the annual business meeting of the chapter.

### ***5. Chapter Finances***

Annually, formal financial reporting shall be made to the membership. All officers and board members shall declare and ensure that they do not profit financially from chapter operations or otherwise have conflicts of interest related to the chapter.

## **Article VI—Nominations and Elections**

### ***1. Nominations***

Each year, the president or his or her designee shall send to all full members a nomination ballot for president-elect and for the number of at-large members of the board necessary to complete the voting membership of the board. For each office that appears on the nominating ballot, each full member may propose up to four names and may nominate the same person for more than one office.

The president and/or person designated by the president shall count the ballots and shall ask those nominees receiving the largest number of votes for each office if they are willing to stand for election, and shall proceed through the list in the order of vote count until at least two candidates for each office have been obtained. No one may hold two offices at the same time, so if a voting member receives enough nominations for two offices, the president shall request that the individual choose the office for which he or she wishes to be a candidate.

After the list of candidates has been determined, the president shall send to all full members whose

membership dues are paid a ballot for all matters to be voted upon, together with a statement on which the names of the candidates for each office are listed in alphabetical order with brief biographical descriptions.

Members of the board shall be elected by a plurality of the votes cast at an election.

All nominations and votes shall be made by secret ballot.

## ***2. Terms***

Officers and other members of the board shall assume office on the first day after the close of the annual business meeting at which their election is announced. Officers shall hold office until their elected successors assume office in their stead.

## **Article VII—Meetings**

### ***1. Annual Business Meeting***

There shall be at least one annual business meeting of the chapter. Initial notice of the annual business meeting shall be given to all members in good standing not less than three months prior to the scheduled date.

Any motions made at the annual business meeting may be passed only by a plurality of the votes cast.

### ***2. Quorum***

A quorum at the annual business meeting shall consist of not fewer than [XXX] members in good standing present and voting.

### ***3. Reports***

The annual business meeting shall include a report of officer and board activities over the year as well as a financial report.

## **Article VIII—Committees**

### ***Committees***

All committees are constituted by and operate under the direction and at the pleasure of the board.

The committees of the chapter shall consist of such standing committees as may be provided by these bylaws and such special committees as may be established by vote of the board, and may include the following:

### ***1. Membership***

The Membership Committee shall consist of a chair appointed by the president, who shall appoint at least two additional members with the advice and consent of the board.

### ***2. Program***

The Program Committee shall be appointed by the board. The primary duty of the Program Committee shall be organization and management of the chapter's annual business meeting.

### ***3. Publications***

The Publications Committee shall be appointed by the board. The role of the Publications Committee shall be to edit, publish, and distribute items designated by the board. The budget of the Publications Committee shall be submitted prior to the annual meeting of the executive committee and shall be presented for approval and reviewed at that time.

#### ***4. Public Policy***

The Public Policy Committee shall be appointed by the board. The role of the Public Policy Committee shall be to advise and assist the board regarding matters involving behavior analysis and governmental entities.

### **Article IX—Dues**

#### ***1. Dues***

Dues for the various categories of membership shall be established by a simple majority vote of the board. This action can be rescinded by a three-fifths majority vote of those present and voting at the annual business meeting of the association. In this case the board shall propose an alternate schedule of dues for approval by simple majority of those present and voting.

#### ***2. Collection***

Dues shall be payable in the time and manner prescribed by the board and published to the membership at large at least six months prior to the due date.

Any member who has not paid his or her yearly dues shall not be allowed to vote on any matter presented to the members.

### **Article X—Amendments**

#### ***Process***

These bylaws may be amended only by two-thirds vote of the members voting. Amendments may be proposed by simple majority vote of the board.



## APPENDIX D: SAMPLE OUTLINE FOR ANNUAL REPORTS

**Note:** This section is for reference only. ABAI will send individualized links to report forms.

*ABAI is a nonprofit membership organization with the mission to contribute to the well-being of society by developing, enhancing, and supporting the growth and vitality of the science of behavior analysis through research, education, and practice.*

Fields marked with an asterisk are required.

### Chapter Type\*

### Geographic Boundaries\*

### Article for the ABAI Publication\*

Please provide an article for ABAI's member publication, *Inside Behavior Analysis*, updating the ABAI membership about chapter accomplishments over the past year and your plans for the upcoming year. You may also wish to include information about becoming a chapter member, benefits of membership, upcoming workshops and/or conferences, etc. This article will be published after the ABAI annual convention, so references to the convention should be in the past tense. Articles should be no fewer than 500 and no more than 1,500 words to be appropriate for publication.

### Article Author(s)\*

**Please select the top three issues of importance to the chapter** (promotion of ABA science/services, CE/professional development, website development, journal/newsletter development, higher education, membership, finances and fund-raising, public policy/legislation, insurance, licensure/certification, other):\*

- 1.
- 2.
- 3.

### Web Information

Please update the following. This information will be posted on the ABAI website for visitors interested in your chapter.

Mission Statement:\*

Description of Membership:\*

Annual or Recurring Events:\*

Newsletters/Publications:\*

Why is this chapter specifically of interest to behavior analysts?\*

### Contact Person

Name:\*

State/Province:

Country:

Phone:

Fax:

Email:\*

### **Chapter Officers**

Who are your current officers, what are their roles, and what is the highest degree each has earned?\*

### **Membership**

How many members did the chapter have for your last completed membership year?\*

Is this number actual or an estimate?\*

How many of your members are not ABAI members?\*

Is this number actual or an estimate?\*

What are the annual membership dues? (If not entering amounts reflecting U.S. currency, please indicate the currency used.)\*

Full Members

Student Members

Affiliate/Paraprofessional Members

### **Conference**

Will the chapter hold a conference in the next 12 months?\*

Date(s) of conference:

Location (city, state, and venue):

Does the chapter provide CE for behavior analysts and/or psychologists?

What does the chapter charge for CE?

What are the conference registration fees? (If not entering amounts reflecting U.S. currency, please indicate the currency used.)

Full Members

Student Members

Affiliate/Paraprofessional Members

### **Dissemination**

Does the chapter publish a newsletter?\*

If the chapter has a website, please provide the URL:

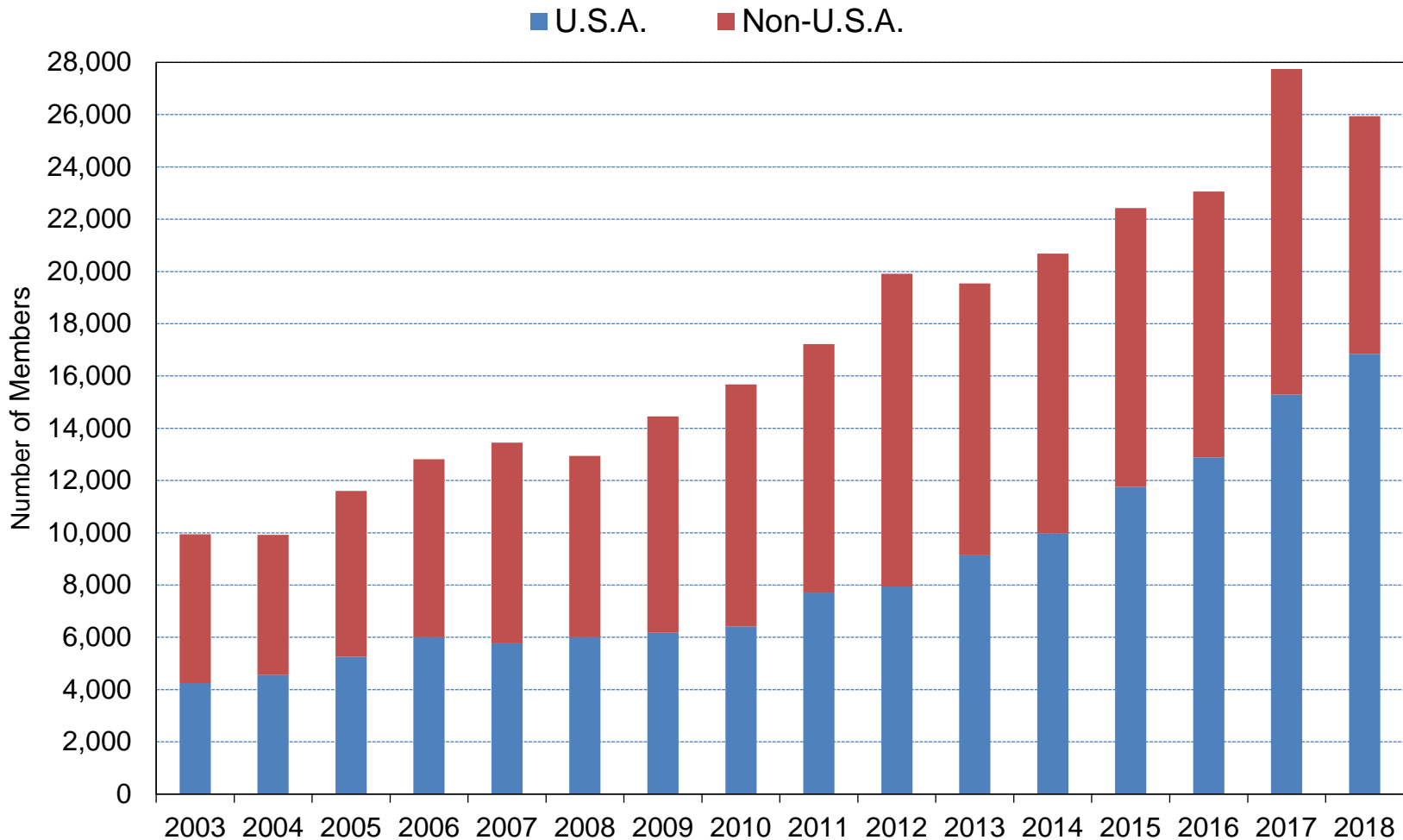
Does someone in the chapter monitor legislative issues for the chapter?\*

### **Comments**

## APPENDIX E: CHAPTER DATA

Figure 1 illustrates the total number of chapter members for chapters in and outside of the United States.

**Figure 1.** Reported Chapter Membership per Year From 2003 to August 2018.



## **APPENDIX F: FINANCIAL MANAGEMENT**

### **Getting Started**

In the USA, many states offer small business development centers through colleges and universities, to provide free assistance with business plans, marketing strategies, finances, and other issues. There are chambers of commerce all over the world, and many of these offices can help with information about other businesses and services able to assist chapters. These organizations can also provide information about taxes and legal organizational status (such as partnership, corporation, etc.). They can be found through an online search or by contacting a local college or chamber of commerce. In the United States, contact information for small business centers can also be found through the Small Business Administration (SBA) in Washington, D.C., at (800) 827-5722 or <http://www.sba.gov/>; in addition, answers to specific questions can often be found in the small business section of the IRS website: [www.irs.gov](http://www.irs.gov). Finally, numerous online resources offer free examples of forms for financial tracking and legal agreements. One example is [www.allbusiness.com](http://www.allbusiness.com).

### **Record Management**

It is recommended that the governing board of the chapter elect a secretary-treasurer to maintain proper financial records and reporting. This officer should have experience in handling business accounts, including a basic knowledge of bookkeeping.

The chapter secretary-treasurer should keep copies of all materials filed with local, state, provincial, or federal governments. He or she should also make copies of all correspondence to and from ABAI, as well as to and from the chapter accountant and lawyer (if applicable). These records should be kept for future reference. In the United States, for tax purposes, all financial records must be kept for 7 years.

### **Professional Resources**

Chapters might consider contracting the services of a certified public accountant or other appropriate tax professional to prepare year-end tax reports and review any decisions that may have financial implications. An accountant is also a good resource when making financial decisions and can advise the chapter of tax benefits that may otherwise be overlooked. An attorney may be consulted to advise the chapter on, and to answer questions regarding, the legal status of the organization. Often professional service providers offer discounts to not-for-profit organizations.

### **U.S.A. Chapters—IRS Status**

Chapters in the USA **may** be eligible for not-for-profit status under the Internal Revenue Code 501(c)(3) or 501(c)(6). It is recommended that the chapter seek legal assistance to file the appropriate forms. If the secretary-treasurer or a board member wishes to petition for not-for-profit status on behalf of the chapter, he or she should contact the IRS directly. The telephone number to order forms from the IRS is (800) 829-3676. The required documents are Form 8718 (User Fee Form), Pkg. 1023 and Pkg. 1024 (Application to Obtain Tax Exempt Status), and Publication 557. Chapters are prohibited from establishing for-profit status. More information about establishing tax exempt status may be found at <https://www.irs.gov/charities-non-profits>.

### **Business Accounts**

It is recommended that chapter cash assets be deposited into business bank accounts. These should be separate from personal checking and savings accounts, as the chapter should be treated as its own entity. This aids in better financial tracking of assets, income, and expenditures.

Business checking and savings or money market accounts should have two co-signers so that if one co-signer is unavailable, the other can continue to act on behalf of the chapter. It is highly recommended that

the institution in which the chapter deposits its cash be insured by a government agency (for example, in the USA this would likely be the FDIC).

### **Reporting**

It is recommended that the secretary-treasurer report the financial status of the chapter to the board at least once a year. The minimum recommended reporting should consist of an income statement, a balance sheet, and a cash disbursements statement. The board should take time to discuss spending and earning patterns so those trends may be identified and used to the advantage of the chapter. It is also advisable to share financial information with the chapter membership.

### **Budgeting**

It is recommended that the secretary-treasurer, along with the board, develop and adhere to an annual budget. The secretary-treasurer should use spending and earning information from the past 3–5 years to develop a budget. If this is the first year in which this information is to be tracked, estimate expenses based on anticipated activities.

### **Chapters Outside the United States**

Laws regarding the founding, legal status, and financial management of organizations vary widely from country to country. ABAI recommends that all chapters, in all locations around the world, learn the laws and regulations that affect them. This may require soliciting the advice of attorneys, certified financial professionals, or other experts.