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## ACSP Policy Manual

### Introduction

Written documentation is essential for effective and consistent communication within the ACSP, and the provision of clear, written policies, standard practices, and procedures that reflect current community expectations, assists in accountability. Further, written policies, standard practices, and procedures provide tangible evidence of intended efforts that are consistent with the organization's mission and values.

IRS Form 990 instructions provide: "Whether a particular policy, procedure, or practice should be adopted by an organization may depend on the organization's size, type, and culture. Accordingly, it is important that each organization consider the governance policies and practices that are most appropriate for that organization in assuring sound operations and compliance."

Nothing in this document is intended to override the policies already outlined in either the registered Articles of Incorporation or the current membership-ratified Bylaws, both to be found on this ACSP web page: <https://www.acsp.org/page/PubsArchiveGovDocs>. Policies, practices, and procedures should be regularly reviewed, evaluated, and updated.

- **Policy** – Policies are proposed by the Institutional Governance Committee and approved by the ACSP Governing Board. They are the collective wisdom of the board, passed on to future leaders. Confirmation of policies is documented in the Articles of Incorporation; Association's Bylaws; and recorded in the historical minutes of Governing Board meetings. New policies recommended by leadership or staff may be researched for common examples and revised to suit the organization.
- **Standard Practices** – Practices are rules for the way business is conducted for the Association, but not necessarily policy, and the practice can be managed differently with current leadership's approval. These can be found in a document separate from this policy manual. Practices may become policy with proposal and approval of the Governing Board.
- **Procedures** – Intended to be a helpful roadmap for staff, procedures are the "how to" for tasks established by Association and committee chairs to be passed on to whoever takes on the responsibilities in the future. These can be found in various documents stored by the ACSP staff. They are administrative and variable based on current needs. They are not included in this document.

Recommendations for updates and new policies should be made by the Institutional Governance Committee to the Executive Committee at its meeting the month prior to the Fall Governing Board meeting.

Recommendations for policy additions or revisions should be proposed to the full board for discussion and vote of approval. Each policy shall have the following references to ACSP Minutes as time goes on:

- Original Date of Acceptance
- Date of Revision and Acceptance



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## Conferences, Events & Workshops

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### Peer Review

Date/Reference of Acceptance: (p.4, Toronto 1995)

Date of Revision/Acceptance:

The board requires each and every organization to establish an international and national peer review process for evaluating every paper submitted.

### Discussants

Date/Reference of Acceptance: (p.4, Toronto 1995)

Date of Revision/Acceptance:

ACSP Annual Conference organizers are required to assign discussants to as many formal paper sessions as possible.

### Conference Location

Date/Reference of Acceptance: April 25, 2020

Date of Revision: November 2, 2022

Date of Revision: April 9, 2025

### Background

On April 25, 2020, the ACSP Governing Board created a new policy to guide the selection of future locations for the annual conference and other in-person events. This policy was further refined in the fall of 2022 in response to additional concerns about how the location and venue for the annual conference and other ACSP events are selected.

In 2024, the Governing Board voted to move the 2023 conference location from Miami and Chicago to stay in alignment with [the ACSP's value statement of creating "An inclusive and welcoming environment within all our association activities."](#) Following the 2024 decision, this policy was revised (1) the organization will select geographically diverse conference/event locations, from those exemplifying ACSP values to those that actively challenge them, to support conversations and advocacy efforts that are central to our mission and, (2) invite/incorporate early (at least 22 months before site selection) feedback from key groups and individuals to (absolutely) minimize the necessity for any last-minute change of venue for any reason.

Overall, the ACSP Event Location Policy serves as a framework to choose places that will (1) uphold ACSP values, (2) ensure affordability for attendees, (3) ensure the safety and comfort of our attendees, (4) minimize greenhouse gas emissions, (5) have hotels and venues with sufficient space capacity and fair workplace practices, (6) diversify the sites of ACSP events as much as possible (7) support historically marginalized local businesses and (8) engage with local issues. Each of these selection priorities is discussed in detail below.

Additionally, this policy lays out a clear process for choosing event locations. Most importantly, ACSP will obtain feedback from the Governing Board and Interest Groups well in advance to minimize the need to change the locations or cancel events, and to deal with force majeure events. The procedural expectations are also discussed in detail below.



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1. Uphold [ACSP values](#)

ACSP recognizes that all locations embody a legacy of injustice, including foundational injustices (like slavery, settler colonialism, violent patriarchy, and racial capitalism). ACSP acknowledges the concerns expressed by colleagues in states or provinces where legislation and policies (e.g., anti-immigrant, anti-2SLGBTQIA, anti-DEI, worker-rights, etc.) further exacerbate existing injustices, pose a risk to academic freedom, and threaten the physical and psychological safety of ACSP conference or event attendees. We recognize that these concerns extend beyond the location of events and have an impact on the ability of faculty, staff, and students to actively engage in their everyday work.

With this in mind, each national conference and, when feasible, other ACSP-organized events, will use the selected location to further planning practice and scholarship with a view toward teaching and research about historical and current injustices. This could be through the theme of the event or specific content (for example, sessions, tours, and local speakers). ACSP makes every effort to seek local jurisdictions that promote equality and equity throughout its entire population, and that take measures to support and give voice to communities experiencing the impact of policies that inhibit diversity, equity, and inclusivity. ACSP will seek to engage with communities disadvantaged by these policies and the challenges these policies create. ACSP recognizes that states and provinces may differ from their local jurisdictions regarding policies and legislation related to equality and equity.

In our effort to uphold ACSP values, we aim to hold our conferences and events in cities and states/provinces that show a commitment to these values as well as provide opportunities for conversations and progress in cities and states/provinces where these values face challenges. In selecting a state, ACSP will give priority to considering the actions of local jurisdictions within the state. ACSP will consider the need to engage with a broad range of regions and communities from year to year. The conference planning committee should proactively seek out states where ACSP events have not recently been held, as part of a concerted effort to enhance inclusivity in selecting conference locations. This approach encourages a broader geographic distribution of events, ensuring diverse communities have the opportunity to host and participate in ACSP activities.

2. Ensure affordability for attendees

Acknowledging attendees' motivation to maintain affordability, ACSP will make every attempt to find locations that are easy to get to, whether by air or ground. Affordability needs to be considered for all participants, especially considering students, junior faculty, and international scholars. Cities that provide better mobility choices and accessibility will be prioritized. For example, cities with an international airport and public transit access to and from the airport will be prioritized.

ACSP will create opportunities for doctoral students to volunteer at the annual conference in exchange for reduced/no-cost conference registration. Opportunities for doctoral students to support registration, meeting room staffing, and other conference-related activities will be advertised before the opening of conference registration.

3. Ensure safety and comfort for attendees

Ensuring the safety and comfort of our conference attendees is paramount. We are committed to creating an environment where all participants can freely express their ideas, share their academic research, and engage fully without concern for their physical and emotional well-being. To support this, we seek venues ideally with gender-neutral bathrooms, ease of access to material health care, lactation rooms for new mothers, and dedicated prayer spaces to accommodate diverse personal needs. We also prioritize the security of our attendees both within and outside conference spaces by implementing robust safety measures and providing



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clear information on local and state laws that might affect their experience. Our goal is to make every attendee feel safe, respected, and valued throughout the event.

4. Minimize greenhouse gas emissions

Minimizing greenhouse gas emissions is a critical aspect of our commitment to environmental responsibility. By strategically choosing event locations that have an international airport and are accessible by train and other modes of public transit, we significantly reduce the need for individual car travel. We partner with hotels that are not only close to the airport but also those that adhere to green practices. These eco-friendly accommodations often include energy-efficient systems, waste reduction programs, and sustainable sourcing policies. This comprehensive approach ensures a more sustainable and environmentally conscious event experience.

5. Have hotels and venues with sufficient space capacity and fair workplace practices

In selecting a hotel and other venues for events, ACSP will seek hotels and venues that meet minimum space requirements. In addition, ACSP will select hotels, where possible, that show a record of supporting workers' rights, including unionization.

6. Diversify the sites of ACSP events as much as possible

In selecting locations for our conference, we prioritize inclusivity and diversity by choosing venues across both red and blue states. This approach ensures that we engage a wide range of perspectives and backgrounds, fostering a richer dialogue and exchange of ideas. Additionally, we are committed to refreshing our conference experience by rotating through locations where we have not hosted in the last 10 years. This strategy not only invigorates our conference with new settings and opportunities but also expands our engagement with different communities, making each event unique and accessible to a broader audience.

7. Support historically marginalized local businesses

ACSP will identify and compile a list of historically marginalized businesses (for example Indigenous, 2SLGBTQIA, racial and ethnic minority, and women-owned) in the local jurisdiction of the event, and as far as is practical and financially responsible, work with these businesses for its activities. The list will be shared with event attendees and the leadership of ACSP Interest Groups for their use. In addition, ACSP will connect with local contacts, for example, the state/provincial or local chapters of the American Planning Association, Canadian Institute of Planners, and L'institut canadien des urbanistes, to identify other marginalized businesses and institutions that are available for partnerships.

8. Engage with local issues

We are dedicated to supporting all our colleagues regardless of their location or the political climate in which they work and study. ACSP will engage with the American Planning Association, Canadian Institute of Planners, and L'institut canadien des urbanistes to identify key contacts in its state/provincial and local chapters and local planning organizations. These individuals and organizations will be sought as partners in identifying opportunities to engage with local issues. Overall, ACSP seeks to have a positive impact on event host communities and to advance principles of good planning, environmental protection, and social justice through its engagement, programming, investments, and expenditures.

Obtain feedback from the Governing Board and Interest Groups before finalization of the location for the Annual Conference and other events



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Approximately 22 months before the annual conference in question, the ACSP Executive Committee will convene a task force that will use this Location Policy to provide an initial list of 4-6 possible event locations and venues to the Executive Committee. This task force will comprise a representative of each ACSP Interest Group, two members of the Governing Board, two at-large members, and the Vice-President/President-Elect of ACSP. ACSP staff will research these locations by issuing a request for proposals to the convention and visitors bureau and to the hotels in each city. ACSP staff will present their findings to the Executive Committee. Approximately 19-20 months ahead of the annual conference in question, the Executive Committee will approve a list of 2-3 possible locations and share it with the Governing Board and the leadership of each ACSP Interest Group and other stakeholders. The Governing Board and each Interest Group will be given reasonable time (approximately three weeks) to respond to the list of 2-3 locations that the Executive Committee approved. The Executive Committee will consider the opinions of the Governing Board Interest Groups and other pertinent stakeholders when making a final selection for the location for the annual conference and other events.

#### Select or cancel a location

Early selection of the state/province, local jurisdiction, and main hotel for the annual conference or other events may result in favorable contractual terms for ACSP. However, making these decisions too early means that ACSP will expose itself to changes in state, local, or hotel policies that may go against the values of ACSP. A reasonable lead time for selecting a local jurisdiction and main hotel for the annual conference is 2 years. Cancellation clauses are negotiated in the contract to protect the hotel through payment of a percentage of the conference's anticipated revenue to the hotel. These cancellation penalties are standard in the industry. The percentage is higher as the dates of the event draw nearer.

If circumstances change between the time selections are made and the annual conference is to be held, the Executive Committee will consult with the Governing Board, ACSP Interest Groups, and its broader membership on possible courses of action ACSP can take to minimize impacts to its membership, or other actions that can signal material and moral support to affected ACSP members and locally disadvantaged groups (see items 4 and 5) while bearing in mind the Governing Board and the Executive Committee's fiduciary responsibility to ensure ACSP's solvency.

The lead time for selecting locations for other events such as the administrators' conference and new chairs school, in-person Governing Board meetings not held in conjunction with the annual conference, and in-person Executive Committee meetings are expected to be much shorter as these meetings are smaller. There is expected to be less financial advantage for having a long lead time. Nonetheless, if circumstances change between the selection of a location and the scheduled dates for these events, the Executive Committee will consider other possible courses of action like those outlined in the paragraph above.

#### Deal with force majeure events

After planning (via these guidelines) for an in-person conference, particularly after signing the hotel contract, the only circumstance in which ACSP would consider shifting from an in-person annual conference to an online conference would be in the case of "force majeure." Force majeure includes causes that are beyond ACSP's reasonable control: acts of God, riots, war, terrorist acts, epidemic or pandemic quarantines, civil commotion, breakdown of communication facilities, natural catastrophes, governmental acts or omissions, changes in laws or regulations, national strikes, fire, explosion, or generalized lack of availability of raw materials or energy. Even under these circumstances, the Governing Board and Executive Committee must weigh these decisions against their fiduciary responsibility to ensure ACSP's solvency.

Seek opportunities to utilize additional value statements to inform location policy



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Association values should be addressed whenever possible.

- Excellence in education and scholarship. To live up to this value, there is an opportunity to engage with the planning concerns of a given location and allow them to inform the conference content.
- Broadly inclusive methodological perspectives and a fully inclusive range of voices. To live up to this value, the annual conference must be inclusive and accessible to all.
- Engagement across multiple publics. To live up to this value, it is integral that local schools, APA/CIP/ICU chapters, and community resources be engaged at any location selected for the conference.
- Education that supports inclusion and cultural competence. To live up to this value, the conference location must change each year to ensure that a broad range of regions and communities are included without a region being excluded or privileged.
- An inclusive and welcoming environment within all our association activities. To live up to this value, the conference location and venue must respond to the needs of all attendees and ensure that an inclusive environment is created.

In addition to ACSP values the event location policy should consider:

- **Avoiding Major Holidays:** Scheduling events away from major national and religious holidays can prevent conflicts for attendees who observe these holidays. Some popular holidays during October and November such as Rosh Hashanah, Yom Kippur, Sukkot, Daylight Savings, Election Day, and Veterans Day. This can increase participation and ease travel arrangements. Be aware of local public holidays in potential location areas as these can affect venue availability, cost, and local traffic conditions.

## **Appendix to the ACSP Event Location Policy**

### Operational details about the Annual Conference

This location policy provides guidance for an ACSP task force to establish a list of 4-6 cities to host the annual conference. The task force will provide a summary to the ACSP Executive Committee as to why these cities were selected. To assist the work of this task force, staff will ask the convention and visitors bureau of possible candidate cities to respond to the points below. In establishing candidate cities, the task force will call on the experience of ACSP staff to identify cities that, for example, are too expensive or do not have hotel capacity, thus avoiding the nomination of these cities.

1. ACSP seeks local jurisdictions that promote equality and equity throughout its entire population, and that take measures to support and give voice to disadvantaged communities. Please describe how your city and state or province meet this criterion.
2. ACSP would like to have a positive impact on the communities in which we hold events. Describe how you or other partners in your city, state or province can help ACSP have a positive impact in your city, including advancing principles of good urban/city planning, environmental protection, and social justice through our engagement, programming, investments, and expenditures.
3. ACSP would like to maintain affordability and minimize environmental impacts, including the minimization of greenhouse gas emissions. Please provide descriptions or data on the following:
  - Hotel sleeping room rate
  - Tax rate
  - Ease of access by air or ground.
  - Mobility and accessibility choices that will allow conference attendees to minimize the use of private cars.



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4. ACSP seeks incentives (e.g., tax breaks for nonprofits, lower rates for conference spaces and hotel rooms to minimize costs, flexible cancellation policies for venues, free Wi-Fi, shuttle services, grant or subsidy opportunities, deals with local businesses, etc.). Please describe any incentives your city, state, or province offers.
5. Please provide a list of historically marginalized businesses (for example, Indigenous-, 2SLGBTQIA+, racial and ethnic minority-, and women-owned) in your jurisdiction that ACSP may engage with.

#### Specific considerations about the hotel

The following will be requested from candidate hotels to host the conference: Please explain how your brand promotes and practices diversity, equity, and inclusion in its operations. Links to corporate policies are acceptable, but localized practices are preferred. ACSP prefers hotels with a record of minimizing environmental impacts and supporting workers' rights, including unionization.

#### Checklist to evaluate cities, states, or provinces

Based on the ACSP Event Location Policy, here's a checklist to help with evaluating identified criteria and internal practices. This checklist is designed to ensure that selected locations align with ACSP's values, including promoting diversity, equity, and inclusivity, while also considering practical aspects such as affordability and environmental impact.

#### ACSP Event Location Checklist

##### 1. Uphold ACSP Values

- Will the location prevent or discourage some ACSP members from attending the conference?
- The jurisdiction supports diversity, equity, and inclusion (DEI)
- The jurisdiction represents an opportunity to engage with communities affected by anti-DEI policies
- Collaboration opportunities with local planning organizations
- Potential to positively impact host communities
- Does the jurisdiction have large representations of minority, indigenous, and 2SLGBTQIA+ communities?
- Does the jurisdiction have exemplary track records of supporting minority, indigenous, and 2SLGBTQIA+ communities?
- Availability of marginalized businesses (e.g., Indigenous, 2SLGBTQIA+, racial and ethnic minorities, women-owned)
- Potential for engagement with these businesses

##### 2. Ensure affordability for attendees

- Will the location prevent or discourage some ACSP members from attending the conference?
- Hotel sleeping room rate
- Tax rate
- The location has an international airport
- Will ACSP be tax-exempt?

##### 3. Ensure the safety and comfort of our attendees

- Will the conference goers be able to freely express their ideas and thoughts and share academic research and experience?
- Will the conference goers feel safe outside of the conference space?
- Availability of gender-neutral bathrooms
- Availability of maternal health care
- Availability of lactation rooms
- Availability of prayer room



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- Are there potential local and state laws that may pose a threat to our conference attendees?
- 4. Minimize greenhouse gas emissions
  - Location can be accessed by train or other modes of public transit
  - Hotels that are close to the airport
  - Hotels have green practices
  - Potential for minimizing costs using hotel and other deals
  - Potential for minimizing greenhouse emissions
- 5. Have hotels and venues with sufficient space capacity and fair workplace practices
  - Meet minimum space requirement (1,500 people)
  - Interaction-facilitating layout
  - Diversity, equity, and inclusion workplace practices
  - Support for workers' rights and unionization
- 6. Diversify conference locations
  - Has an ACSP conference been held in the city in the last 10 years?
- 7. Support historically marginalized local businesses
  - Work with interest groups to make a list of businesses people can support while visiting.
- 8. Engage with local issues
  - Invite local organizations, planners, activists, and other stakeholders to take part in panels and roundtables.
  - Organize mobile tours

This checklist aims to ensure that each location chosen for ACSP events reflects the organization's values and commitments, while also considering practical and logistical aspects essential for successful event planning.

### **Meetings & Conferences Code of Conduct**

Date/Reference of Acceptance: June 12, 2018, Governing Board Electronic Vote

Date of Revision: Revised April 2020; revised March 31, 2023

This Meetings & Conferences Code of Conduct applies to all ACSP (Association of Collegiate Schools of Planning) meeting-related events, including those sponsored by organizations other than ACSP but held in conjunction with ACSP events, in-person at public or private facilities, on-line and in virtual events. ACSP is committed to providing a productive and welcoming environment for all attendees. All attendees, including, but not limited to, attendees, speakers, volunteers, exhibitors/vendors, ACSP staff, service providers, and others involved in the events, are expected to abide by this code, specifically, to uphold the principles of *Integrity, Respect and Responsibility*:

- *Integrity*: acting in an honest and ethical manner;
- *Respect*: honoring differences in people, ideas, and opinions; and
- *Responsibility*: accepting ownership for one's own conduct.

### **ZERO Tolerance**

ACSP has zero-tolerance for *any form* of discrimination or harassment, physical and verbal, by attendees at our meetings and reserves the right to take any action necessary to uphold the principles outlined in this code. ACSP will cooperate with any appropriate authority investigating a reported incident.



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In response to repeated and witnessed incidents of unacceptable behavior as listed below, ACSP reserves the right to communicate within the appropriate channels of an attendee's home institution or organization and also reserves the right to prohibit attendance at any future meeting.

### Expected Behavior

- Treat all attendees with respect and consideration, valuing a diversity of views and opinions.
- Be considerate, respectful, and collegial.
- Communicate openly with respect for others, critiquing ideas rather than individuals.
- Avoid personal attacks directed toward other attendees.
- Be mindful of your surroundings and of other event attendees. Alert on-premises security personnel and ACSP staff if you notice a dangerous situation or someone clearly in distress.
- Respect the rules and policies of the meeting venue, hotels, ACSP contracted facility, or any other venue associated with an ACSP event.
- Audio or visual recording (photo or video) or presentations made at ACSP meetings or conferences are not permitted unless you have received explicit verbal permission from the presenter.
- ACSP encourages attendees to follow recommended precautions to prevent transmission of infectious diseases.

### Unacceptable Behavior

- Any intimidating, harassing, demeaning, or derogatory speech or actions towards others that undermine principles of academic and professional exchange (language adopted from the *UAA Code of Conduct*).
- Physical abuse of any attendee.
- ACSP prohibits the use of hotel sleeping rooms for any interview or meeting among attendees for purposes relevant to an ACSP event. ACSP does not offer hotel sleeping rooms as an option for interview rooms and/or meeting space.
- At most ACSP networking events, both alcoholic and non-alcoholic beverages are served. ACSP expects attendees at our events to drink responsibly and reserves the right to deny service to attendees for any reason and may require an attendee to leave the event.
- Additional examples of unacceptable behavior include, but are not limited to:
  - disparaging comments related to gender, gender identity or appearance, sexual orientation, disability, physical appearance, body size, race, religion, ethnicity, national origin, political views or affiliation;
  - threatening or stalking any attendee;
  - disruption of presentations at sessions, in the exhibit hall, or at other events organized by ACSP at the meeting venue, hotels, or other ACSP-contracted facilities.

### Reporting Unacceptable Behavior to Those with Legal Authority

- To your Employer - Attendees are subject to the policies and procedures of their place of employment. As such, an employer (e.g., university, vendor) is the entity to which an incident should be reported, and that which will perform any future investigation of the incident.
- To Public Security – ACSP asks, under advisement from legal counsel, that anyone experiencing or witnessing behavior such as assault of any kind that constitutes an immediate or serious threat to safety is advised to contact 911 or ask for public security.



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Reporting Unacceptable Behavior to the ACSP (intended for information gathering and on-site peer support when feasible)

- To ACSP Staff – If you are the subject of unacceptable behavior or have witnessed any such behavior, please notify an ACSP staff member. Notification should be done by contacting an ACSP staff person on site or by emailing your concern to [presidentsoffice@acsp.org](mailto:presidentsoffice@acsp.org). On advisement of legal counsel, ACSP is unable to respond to social media.
- To an Anonymous Web Form – A form will be available through the conference app and the ACSP web site for reporting issues of concern during the conference. The information submitted to this form is only viewable by the ACSP Executive Committee and ACSP Executive Director.

### **Annual Conference Budget**

Date/Reference of Acceptance: (p.6, UK 1991)

Date of Revision/Acceptance:

The annual ACSP conferences are to be organized on a break-even basis at a minimum and should produce a modest surplus.

### **Removing Presenters from the Program**

Date/Reference of Acceptance: (p.5, Toronto 1995)

Date of Revision/Acceptance:

ACSP Annual Conference organizers are encouraged to remove formal paper presenters from the final program if their full papers have not been received by the discussants by the deadline for the publication of the final program established by the Chair of the Local Conference Committee. This item strongly encourages removing formal paper presenters if they are late in their submissions.

### **Annual Conference Sponsored/Named Conference Tracks**

Date/Reference of Acceptance: Fall 2000

Date of Revision/Acceptance:

The Executive Committee, in response to the request of public or private organizations whose goals complement the ACSP Mission, may vote to establish a conference track which is designed to promote scholarship on specific planning topics or to encourage planning faculty or students to conduct research in targeted substantive areas., if the public and private organizations making the request to contribute to ACSP no less than \$15,000 per year.

The conference track may be named after the funding organization(s), if appropriate.

The funders will receive three complementary conference registrations for the first \$15,000 they donate and one additional complementary registration for every additional \$5,000 they donate to ACSP.

All papers presented in sessions on the named conference track must be submitted to and accepted through the normal ACSP annual conference peer review process.

- The funding organization(s) may elect to organize two special sessions in the track which are not peer-reviewed if the subject or focus is consistent with the ACSP mission.
- All participants on these specially organized sessions must pay the full conference registration fee unless the funding organization designates them to receive one of its complementary registrations or the participants meet all three of the following conditions: a) they are attending only the session in which



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they are participating; b) they are not a faculty member in the planning program of an ACSP member school; and c) they have not previously attended an ACSP conference.

The ACSP Conference Committee Chair will establish either an alternative track or an alternative peer-review process for those authors who work in the research area(s) which the track targets but who do not wish to have their papers presented in that track.

ACSP will appropriately advertise the track and any special sessions in all mailings and materials about the annual conference, on the ACSP website, in UPDATE, and by email.

- The funding organizations will be described in all conference materials as major donors and will be so acknowledged at conference events.
- In addition, ACSP will devote one-half page in the final program to any appropriate materials which the funding organization(s) would like to appear.

If fully compensated for additional costs, the ACSP president may agree that ACSP will conduct additional tasks which complement the track activities. This may include helping authors prepare papers for publication, editing articles, putting together proceedings, organizing symposia, etc.

#### **Annual Conference Named or Focused Annual Conference Sessions**

Date/Reference of Acceptance: Fall 2000

Date of Revision/Acceptance:

The Chair of the ACSP Conference Committee, or-The ACSP Vice President/President Elect may agree to accept one or more annual conference sessions on specific planning topics organized by public or private organizations if these topics complement the ACSP Mission and meet the following conditions:

- The session(s) may be named after the funding organization(s), if appropriate.
- The organization organizing these sessions donates to ACSP no less than \$2500 for each session each year.
- Any organization may organize complete sessions and submit them by the published deadline for consideration through the regular ACSP peer-review process; if the sessions are accepted after peer-review, ACSP will have no expectation of a mandatory grant.
- The session organizers must meet all conference schedule, program, and printing deadlines.

The funders will receive one complementary conference registration for every two sessions (\$5,000 grant) they establish. Participants on these specially organized sessions must pay the full conference registration fee unless they meet all three of the following conditions:

- They are attending only the session in which they are participating.
- They are not a faculty member in the planning program of an ACSP member school.
- They have not previously attended an ACSP conference.

ACSP will appropriately advertise the special sessions in all mailings and materials about the annual conference, on the ACSP website, in UPDATE, and by email; the funders themselves may purchase additional advertising or undertake other forms of promotion, after consultation with the ACSP president.

If fully compensated for the additional cost by the session organizers the ACSP president may agree that ACSP will conduct additional tasks which complement those sessions. This may include helping authors prepare papers for publication, editing articles, putting together proceedings, organizing symposia, etc.

### **Reduced Registration Fees for Attendees from Low Resourced Countries**

Date/Reference of Acceptance: Minutes Spring 2017

Date of Revision/Acceptance:

- This registration fee is the same as for ACSP member students.
- Eligibility is based on the location of the home institution, not on temporary residences or guest institutions.
- This list of countries comes from the [World Bank's classifications](#) of "Low Income" and "Lower-Middle Income" economies using 2016 GNI per capita data calculated using the "World Bank Atlas Method."

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## **Committees**

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### **Financial Support of Committees**

Date/Reference of Acceptance: (p.7, UK 1991 from Fisher group report)

Date of Revision/Acceptance:

Committees established by the officers, or the executive committee cannot expect financial support for travel and lodging for the committee to meet, or for the support of graduate research assistants.

### **Reimbursement of Committee Project Expenses**

Date/Reference of Acceptance: (p.7, UK 1991 from Fisher group report)

Date of Revision/Acceptance:

Prior approval for expenses is required before expenditure. Every effort should be made to have the Association pay for expenses directly. Requests for reimbursement must be received by the Association office within 45 days after incurring authorized expenses or absolutely before the end of the fiscal period.

### **Surveys Conducted on behalf of the ACSP**

Date/Reference of Acceptance: Minutes Spring 1999

Date of Revision/Acceptance:

All ACSP Committees or Task Forces not specifically and clearly charged with the collection of particular data must inform the ACSP Executive Committee and all other Committees and Task Forces of their intention to conduct surveys, focus groups, or informal questioning among the membership, explain how they intend to use the data collected, submit a detailed draft of their questions and indicate the scope of their survey and its proposed schedule. In addition, to be eligible for ACSP assistance any committee wishing to conduct a survey must show that the required data are not already being collected elsewhere. Lastly if a survey is conducted every effort shall be made to coordinate the surveying with the Institutional Data Collection Effort.

### **Management of the Pre-Doctoral Workshop**

Date/Reference of Acceptance: Minutes Spring 2015



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Date of Revision/Acceptance:

The ACSP Pre-Doctoral Workshop will have an MOU, an advisory committee composed of present, past and future co-hosts to guide the program creation, and that the administration including solicitation of new local hosts and evaluation by participants will be moved to the Committee on Diversity over a period of months.

### **Choosing Winners of Awards**

Date/Reference of Acceptance: Minutes Spring 2017

Date of Revision/Acceptance:

Award committees are to pick one winner and not have honorable mentions or “ties”.

### **Accepting Outside Funds for Awards**

Date/Reference of Acceptance: Minutes Fall 2000

Date of Revision/Acceptance:

ACSP will accept funds for four categories: 1) named prizes or awards (new or renamed); 2) prizes or awards given by organizations or associations; 3) conference sessions, and 4) conference tracks. In return ACSP requires funders to pay an overhead charge of 25% (limited to a minimum of \$250 and a maximum of \$1000) to cover administration costs. Existing awards prior to the year 2000 are grandfathered in and thus not subject to this policy.

### **Prizes or Awards Given by Organizations or Associations**

Date/Reference of Acceptance: Minutes Fall 2000

Date of Revision/Acceptance:

The Executive Committee may vote to give an award, prize or fellowship to promote scholarship on specific planning topics or to encourage planning faculty or students to conduct research and publish in targeted substantive areas, if these topics are supportive of the ACSP Mission Statement and meet the following conditions:

- All aspects of the award are fully funded by individual donations or a grant from one or more public or private institutions for an agreed period of time (generally at least three years).
- The funders contribute to ACSP an additional 25% of the award amount as an administrative fee, but no less than \$250 or more than \$1,000. Under exceptional circumstances the President may negotiate the fee.
- The mission and objectives of the organizations and/or individuals funding the awards are consistent with the ACSP Mission.

The award, prize or scholarship may be named after the funding organization(s), if appropriate. The ACSP President, in cooperation with the funders, will establish reasonable standards for the awards, consistent with the ACSP Mission Statement. This may include award eligibility, specific requirements and deadlines. If fully compensated by the funders the ACSP President may agree that ACSP will conduct additional tasks which complement the award. This may include helping authors prepare papers for publication, editing articles, putting together Proceedings, organizing symposia, etc. ACSP will organize and conduct the award selection; the ACSP President will appoint and charge members of the award selection committee in consultation with the funders.



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The Award Committee will organize, advertise, and hold a competition or contest based on the established award criteria and will select and notify winners.

ACSP will not fund the conference travel, registration fee, or other costs of the winner(s) unless the funders have agreed to cover these expenses.

ACSP will decide how and in what forum the award winner(s) is announced; ACSP will also decide the nature of the physical award (plaque, trophy, etc.) and its format consistent with its adopted award policy. Funders may elect to directly pay award winners the cash prize(s) rather than transfer the award amount(s) to ACSP; however the 25% administrative fee, the cost for any additional tasks, and the expense of the physical award(s) must be paid directly to ACSP. ACSP will appropriately advertise the award and winners on the ACSP website, in UPDATE, and by email; the funders themselves may purchase additional advertising or undertake other forms of promotion, after consultation with the ACSP President.

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## Communications

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### **Threatened Schools**

Date/Reference of Acceptance: Spring 1992

Date of Revision/Acceptance:

The President of ACSP is authorized to respond vigorously in support of threatened planning programs in whatever way is deemed desirable, including but not limited to, writing letters of support, calling key administrators at the threatened school, and assisting in mobilizing support for the threatened program.

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## Finance, Investments and Accounting Policies

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### **Finances**

Date/Reference of Acceptance: Prior to 1993 Handbook, but cannot find in the minutes

Date of Revision/Acceptance:

It is the policy of ACSP that major expenses incurred by the organization are paid by the organization, not by the schools of the officers or committee members involved in the activity. These expenses are covered from dues income. To that end, we budget on an annual basis, as stated in the Constitution, with semi-annual reporting of up-to-date operations and cost and revenue forecasts.

We are, however, an organization run by volunteers. Thus volunteer members do their best to cover their own expenses (telephone, mail and secretarial services are examples) when engaged in activities that benefit the organization. It is often possible for faculty from schools with resources to help the organization through hidden subsidies. However, faculty from schools with less, in similar circumstances, might need reimbursement for such expenses from ACSP. However, at no time should the resource base of a member's school be used as a decision criterion in the selection of officers, committee members, or conference sites.



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### **Budget**

Date/Reference of Acceptance: (p.5, UK1991)

Date of Revision/Acceptance:

Prior to the spring meeting of the Executive Committee each year, committee members will be asked to propose budget allocations for the coming fiscal year which begins July 1. The budget requests must include forecasts of revenue and expenditures for all regularly recurring ACSP activities, funds previously committed for the coming year, and could include proposals for new spending. The Executive Committee will adopt a budget for the coming fiscal year in the spring. The committee will also receive budget updates prior to the fall meeting showing amounts budgeted for each category for the current fiscal year, spending to date, and projected spending for the year. Prior to the fall meeting, the committee will receive a final budget report for the previous fiscal year.

### **Operating Budget**

Date/Reference of Acceptance: p.5, UK 1991

Date of Revision/Acceptance:

The Treasurer develops and prepares an annual operating budget to be presented to the Governing Board at the Spring Governing Board Meeting. The Governing Board then accepts and/or amends the budget. The Governing Board may amend the budget during the fiscal year. The Treasurer will report to the Governing Board at each board meeting with the current status of the budget. The Executive Committee reiterates the constitutional responsibility of the President to present a proposed budget to the Executive Committee each year. (p.5, UK 1991). It is the sense of the Executive Committee that the ACSP budget be structured into funds or cost centers, along the lines suggested in the report of the subcommittee on Budgeting, Revenues and Staffing. The precise format is to be developed by the Secretary-Treasurer of ASCP

### **Unbudgeted Expenditures**

Date/Reference of Acceptance: need to find the reference (some time in the past 10 years)

Date of Revision/Acceptance:

Unbudgeted expenditures less than \$5,000 may be made without the approval of the full Governing Board, but with the approval of the Executive Committee. Unbudgeted expenses higher than \$5,000 must be approved by the Governing Board. The President and Treasurer must be notified as soon as possible about any significant unbudgeted expenditure.

### **Investments and Objectives**

Date/Reference of Acceptance: (p.5, UK1991)

Date of Revision/Acceptance:

The objective of the investment program is to obtain the maximum possible return on Association funds while assuring adequate protection of invested assets. Because the Association of Collegiate Schools of Planning is a non-profit organization, investments should not be designed for speculation. It must be recognized, however, that all investments carry with them some degree of risk, not only as to the safety of the principal itself, but also with regard to the inflationary erosion which occurs from failure to achieve an adequate return on invested assets. The Investment Policy segregates funds into two categories: Operating Fund and Reserve Fund.



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Operating Fund - To provide sufficient cash flow to meet the financial obligations of the Association.

- Objectives: Liquidity, Preservation of capital
- Dollar Range - 10-15% of Annual Revenue not including the annual conference revenue.
- Maturity - limited to one year or less.
- Allowable Investments - Checking accounts in federally insured banking facilities; Money Market Accounts which invest in government back securities; Federally Insured Certificates of Deposit.

Reserve Fund - To maintain fiscal stability, ACSP has a reserve fund.

- Objectives: Preservation of capital; Liquidity; Optimize investment return within a one to five-year time frame
- Dollar Range - Amount as required by Association bylaws and as necessary to overcome any expected cash flow deficiencies for the next three years as well as an amount to cover an unexpected association need.
- Maturity - From one to three years
- Allowable Investments: FDIC insured Money Market Accounts; Money Market Funds which invest in government back securities; Federally Insured Certificates of Deposit; Direct Obligations of the U.S. Government, its agencies, and instrumentalities
- Prohibited Investments: Corporate Notes with a minimum rating of investment grade by one rating service; Corporate Securities; Private Placements; Letter Stock; Derivatives; Securities from issuers which have filed for bankruptcy; Commodities or commodity contracts; Short sales; Margin transactions; Option trading; Any speculative investment activities

### **Investment Fund Selection**

Date/Reference of Acceptance: Spring 2019

Date of Revision/Acceptance:

The ACSP will invest 1/5 of mutual funds in socially responsible funds, adding a charge to the Finance and Investment Committee to create performance criteria for increasing the socially responsible investment percentage over a period of time.

### **Reserve Fund**

Date/Reference of Acceptance: Bylaws 3/29/03

Date of Revision/Acceptance: May 2019 to "four times"

Date of Revision/Acceptance:

ACSP will maintain a Reserve Fund with a minimum balance four times the annual base dues revenue from Full Members, Affiliate Members, and Corresponding Members. Revenues to the Reserve Fund shall consist of dividends or interest from investment plus surpluses from other ACSP activities as occasion permits. Withdrawal from the Reserve Fund requires a two-thirds vote of the Governing Board meeting in a regular or special meeting, or by telephone poll, upon petition of the ACSP officers

### **Endowment**

Date/Reference of Acceptance: April 2020

Date of Revision/Acceptance:



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ACSP seeks to raise funds both through endowments and ongoing giving.

#### **Pooled or Single-Donor Accounts**

The Governing Board can establish endowment funds to support ACSP goals. Those endowments might be pooled donations or single gifts. For pooled donations, ACSP should acknowledge donors annually via an association communication (e.g. ACSP News, web page, or other communication media). Pooled donations should establish a target balance at which endowment income will support pre-established goals.

#### **Named Gifts**

The Governing Board must approve all gift names associated with any endowed or gift account. The Governing Board will have the right, at their discretion, to change the name of the gifts at any future point. All gift agreements must include language making clear that the Governing Board retains sole right to name and change the name of the gift or any award(s) associated with the fund. Names which may create confusion with the purpose of existing ACSP gifts (e.g., named book awards, ACSP or interest group awards) should be discouraged. ACSP has several awards that honor current and past members, and the Governing Board should avoid named gifts that might detract from the intent of those existing named awards.

#### **Purpose of Gifts**

The Governing Board can negotiate gifts that are restricted in purpose. Ideally those restrictions would be reviewed periodically by the governing board. A standard gift agreement should suggest review of the gift purpose at five- or ten-year intervals. Gift agreements that designate funds in perpetuity are discouraged, while recognizing that there may be circumstances in which the board determines that designated funds in perpetuity are in the association's interests.

#### **ACSP Benefit**

Endowed funds (pooled or single donation) should be used for activities that benefit ACSP members. ACSP must retain decision making authority about fund expenditures.

#### **Overhead**

Once endowment funds reach \$50,000, they will be expected to pay management fees annually to ACSP to help defray management costs. Suggested levels will be \$1,000 per year for funds with balances between \$50,000 and \$75,000, \$1,500 per year for funds with balances between \$75,000 and \$100,000, \$2,000 per year for funds with balances between \$100,000 and \$150,000, and levels set by the Governing Board for funds with balances above \$150,000 or below \$50,000. ACSP should discourage funds with balances below \$50,000 unless that is a pooled fund with plans for growth.

#### **Membership Dues**

Date/Reference of Acceptance: Bylaws, 3/29/2003

Date of Revision/Acceptance:

The annual dues of Full Members, Affiliate Members, Corresponding Members, and Individual Members shall be fixed by the Governing Board from time to time. Members are expected to underwrite the costs borne by the Association through dues such that the Association's annual revenues are sufficient to maintain operations. The annual budget shall be proposed at a meeting of the Executive Committee and voted upon by the Governing Board. If the proposed increase in dues is to be 15% or greater for any membership class, members of all classes shall receive notice of the proposed dues structure at least 40 days before the Governing Board meeting at which such budget and dues structure will be voted upon



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### **Capitation**

Date/Reference of Acceptance: Bylaws, 3/29/2003

Date of Revision/Acceptance:

Each Full Member pays base membership dues plus an additional assessment for each faculty member with 50% or more time devoted to the Full Member. This assessment is called “capitation”. Capitation may also be paid, and services received, for faculty with less than 50% time devoted to the Full Member. Affiliate Members and Corresponding Members-must pay base membership dues and may elect to pay capitation for those of their faculty that they wish to receive the associated services.

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## **General**

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### **Honoring the Passing of a Member**

Date/Reference of Acceptance: cannot find the reference

Date of Revision/Acceptance:

Once a year, a call will be sent to all member department chairs for information about those who have deceased in the recent past year. Some form of remembrance will take place at the Annual Business Meeting during the annual conference or may possibly be placed in the conference program.

### **Diversity**

Date/Reference of Acceptance: p.4, Austin 1990 (missing document)

Date of Revision/Acceptance:

Racial and gender diversity in the planning community is central to planning education and practice. Therefore, it is ACSP policy to promote such diversity with the organization and to encourage and assist member schools in their efforts to achieve diversity. To promote inclusivity, the following statement shall be posted on the website in reference to membership and the membership application:

*“In principle and in practice, the organization values and seeks diverse and inclusive participation within the field of planning. The ACSP promotes involvement and access to leadership opportunity to all members regardless of race, ethnicity, gender, religion, age, sexual orientation, nationality, or disability. The ACSP will continue to provide leadership and commit time and resources to advance this objective. The ACSP will develop strategies and initiatives to promote and welcome diversity within the board and membership of the ACSP and provide tools for its member universities regarding diversity.”*

### **Reputational Surveys**

Date/Reference of Acceptance: Fall 1992

Date of Revision/Acceptance:

ACSP does not endorse the use of reputational surveys for the purposes of ranking programs and discourages the participation of member schools in such surveys.



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### **Use of Surveys by ACSP Committees and Task Forces**

Date/Reference of Acceptance: Spring 1999

Date of Revision/Acceptance:

All ACSP Committees or Task Forces not specifically and clearly charged with the collection of particular data must inform the ACSP Executive Committee and all other Committees and Task Forces of their intention to conduct surveys, focus groups, or informal questioning among the membership, explain how they intend to use the data collected, submit a detailed draft of their questions and indicate the scope of their survey and its proposed schedule. In addition, to be eligible for ACSP assistance any Committee wishing to conduct a survey must show that the required data are not already being collected. Lastly if a survey is conducted every effort shall be made to coordinate the surveying with the Institutional Data Collection effort.

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## **Governing Board**

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Other policies are detailed in the [current Bylaws](#) so are not duplicated here.

### **Student Governing Board Representatives**

Date/Reference of Acceptance: p.3, New Orleans 1991 (missing document)

Date of Revision/Acceptance:

Specifications require that students have student status for four (4) meetings during the term of their office.

### **Board Member Meeting Attendance**

Date/Reference of Acceptance: Spring 2015

Date of Revision/Acceptance:

If an elected board member misses two consecutive meetings, the president may appoint a new member.

### **Email Voting by the Governing Board**

Date/Reference of Acceptance: Spring 2016

Date of Revision/Acceptance:

The ACSP Governing Board can vote on priority issues that emerge between Governing Board meetings. Votes can be administered via email and could be preceded by a conference call at the request of a Governing Board member. Decisions to vote outside of Governing Board meetings must first include a vote to conduct a discussion on the topic/issue and then members can vote on the actual topic/issue.

### **Board Meeting Notifications**

Date/Reference of Acceptance: Bylaws 2019

Date of Revision/Acceptance:

ACSP Governing Board Meetings are open to all classes of members. The Governing Board shall meet at least annually, including at the Annual Meeting of the Association and other times at the call of the President or of any seven of its voting members; notice of the date, time, place and agenda shall be in writing, and communicated at least two weeks prior to the meeting, to each member of the Governing Board. At the



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distraction of the Executive Committee, the President may call additional meetings by such means as virtual conferencing or conference calls. The Executive Committee will determine guidelines concerning board member attendance at in-person meetings.

#### **Governing Board Member Travel Reimbursement**

Date/Reference of Acceptance: Minutes Spring 2017

Date of Revision/Acceptance:

The ACSP Governing Board has set aside funds for the Spring Governing Board Meeting to support ACSP Governing Board members from minority-serving institutions (Historically Black Colleges and Universities; Hispanic-serving, Asian-serving, and Native American-serving institutions).

1. Prior to the meeting, please submit your request using the form in the bullet list below (to [bookkeeper@acsp.org](mailto:bookkeeper@acsp.org)) that explains how your home institution is minority-serving and confirms that financial support is required to attend the meeting.
2. After the meeting, please submit receipts to [bookkeeper@acsp.org](mailto:bookkeeper@acsp.org).

#### **Student Board Representative Travel Reimbursement for Governing Board Attendance**

Date/Reference of Acceptance: Minutes Spring 2016

Date of Revision/Acceptance:

Student Governing Board representatives shall be reimbursed to attend two meetings, spring and fall (total annual budget allocation for both students for four meetings is split between the two students). Reimbursable expenses include lodging (room and tax only) including all related taxes, but not including telephone calls, internet access or other personal items; travel expenses including airfare, mileage, airport shuttle, train fare, cab fare. Reimbursement requests must come with itemized, detailed and dated receipts within a month of attending the meeting. Other anticipated out-of-the-ordinary expenses should be sent to the ACSP President and Treasurer in advance of the meeting for approval. The ACSP will be prepared to cover student expenses incurred in events where travel disruptions out of the student's control may occur.

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## **Planning Accreditation Board**

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#### **ACSP Academic Appointments to the PAB Board**

Date/Reference of Acceptance: Bylaws 2020

Date of Revision/Acceptance:

Three academic appointments; act as non-voting members of the ACSP Governing Board.

#### **Policy on Educator Site Visitor Applicants**

Date/Reference of Acceptance: Spring 2023 Governing Board Meeting

History of Revision: annual review

An application will be considered complete only with both required documents have been received by the ACSP PAB Site Visitor Nomination Committee Chair.



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1. Applicants may nominate themselves, they may be nominated by their Department Chair, Director, or Dean, or they may be nominated by another member of the PAB site visitor pool.
2. To be eligible, an applicant must be a full-time tenured faculty member or a full-time, non-tenure track faculty member serving at the rank equivalent to a tenured Associate Professor or higher with a program currently holding PAB accreditation.
3. The applicant's record must demonstrate that they are an active and respected participant in the nation's community of planning scholars and are therefore well-qualified to represent the community in the accreditation process.

Each application shall consist of a cover letter and current resume from the applicant sent directly to the PAB Site Visitor Selection Committee Chair and shall address:

- The applicant's ability to speak with authority about planning education in North American universities
  - Examples of the applicant's activities either within their department or within the planning community, that suggest the applicant's appropriateness for the site visitor pool
  - The applicant's written and oral communication skills
  - The applicant's ability to work effectively in a team
  - Any other characteristics of the applicant that might have bearing on site visitor performance
  - Names of 2-3 references that can attest to the statements in the cover letter who can be contacted by the Committee
  - The resume must be current and support the statements in the cover letter
4. Following review by the PAB Site Visitor Nomination Committee, the Chair of the PAB Site Visitor Nomination Committee will recommend to the ACSP President strong candidates for the pool. If the ACSP President agrees, they shall forward to the PAB the names of both a) those applicants deemed eligible to participate as educator Members of the Site Visitor Pool, and b) those not recommended.
  5. The Planning Accreditation Board Site Visitor Selection Committee will make the final selection and will inform all applicants of the outcome.