



**WEBSITE, eNews, SOCIAL MEDIA, CALPLANNER, EVENT  
SUPPORT/MARKETING, CERTIFICATION MAINTENANCE (CM), AND LIST  
RENTAL POLICIES**

UPDATED JULY 2021

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**WEBSITE  
eNEWS  
SOCIAL MEDIA  
CALPLANNER**

**WEBSITE, eNews, Social Media and CALPLANNER POSTING POLICIES**

*If you or your organization would like to post an article, event, or notice on the APA California website or social media platforms, or in the eNews or CalPlanner, here are the policies:*

1. The subject of the article, notice, or event must relate to some aspect of planning or address issues that affect planners and must apply to a regional area at a minimum (i.e., a broader geographic area than a single municipality).
2. If it is an event, it is either sponsored by a nonprofit organization; or if not sponsored by a non-profit organization, the event must not require any fee for attendance.
3. The submitter must provide a source of additional information, either a document to upload, a website to link to, and/or contact information.
4. If images and captions are submitted with the article, event, or notice, the submitter shall have authorization to use the image, i.e., it is original work or authorized for non-commercial reuse. Sources and captions for all photos, images and graphics must be provided.
5. The submitter/author will solely be held responsible for the opinions expressed in their article, notice or event, which are not necessarily those of the editor, editorial staff, or APA California.
6. The article, event or notice prior to posting must have the approval of the President and, if the posting deals with a specific portfolio subject such as certification maintenance or legislation, the appropriate Vice President or Board member.
7. The VP for Public Information reserves the right to determine whether material submitted for publication shall be printed; may hold or reject submitted items due to publication length, staff capacity or content; may edit text for length, clarity, and errors; and may summarize, shorten, or reorganize subject content to be consistent with format and space considerations.
8. The VP for Public Information shall determine how and where subject content will be posted on the social media platforms, website, eNews or CalPlanner.
9. Disclaimer Terms of Use and Privacy Statements and/or links as approved by the Chapter attorney may be included in each eNews, social media platform, CalPlanner, or webinar/event notice.
10. Articles, events, or notices must be submitted through the online APA California Communication Submittal Request form. The deadline to submit an article/event for the week's eNews issue is 5:00 pm on the Monday before publication date, which is every other Wednesday. The CalPlanner is published one or two times per year. The link to the Communication Submittal Request form is here:

<https://forms.gle/69nSf6qFssS8ShEt6>.



**ADDITIONAL CALPLANNER PUBLICATION POLICIES:**

*If you would like to submit an article for publication in CalPlanner, here are additional policies:*

1. The article should be sent using the Communication Submittal Request Form.  
<https://forms.gle/69nSf6qFssS8ShEt6> .
2. If the submitter would like to talk with the VP about an article idea before sending in the form, contact the VP using the contact information below.
3. Articles must be kept to 950 words or fewer. Short, one-paragraph articles with interesting and concise content, bullet points for a sidebar, images, and letters to the editor, are also welcome. Articles should be oriented to practicing professional planners and provide salient information, methodology or insight relevant to the practice of professional planning including generating discussions about best practices, innovative approaches and everyday “how to” tactics.
4. The submitter must provide a source of additional information, either a document to upload, a website to link to, and/or contact information.
5. If images and captions are submitted with the article, event, or notice, the submitter shall have authorization to use the image, i.e., it is original work or authorized for non-commercial reuse. Sources and captions for all photos, images and graphics must be provided.
6. Editorials shall be written as if being reported or offering an opinion about a specific topic or subject. Company, firm, or agency internal materials such as press/media releases and other marketing information cannot be used as stand-alone articles. Source material must be properly credited.
7. The submitter must notify the VP for Public Information whether the article has been submitted to another publication, has been printed in another publication, or if it is about to be published.
8. The VP for Public Information reserves the right to edit articles as noted above and for appropriate content, grammar, and space. Once an article has been submitted, it is considered final, and the submitter will not be allowed to request revisions.
9. To contact the VP for Public Information, please use this email: [information@apacalifornia.org](mailto:information@apacalifornia.org).



## **EVENT SUPPORT/ MARKETING**

### **APA CALIFORNIA SUPPORT AND MARKETING ASSISTANCE REQUEST POLICIES**

*If you or your organization would like to request that APA California co-sponsor, support and/or provide marketing assistance for an event, here are the policies:*

1. The subject and agenda of the event must relate to some aspect of planning or address issues that affect planners and must apply to a regional area at a minimum (i.e., a broader geographic area than a single municipality).
2. The event speakers must include APA California members or have expertise in planning.
3. The event sponsor must request APA California marketing assistance in writing by email to [president@apacalifornia.org](mailto:president@apacalifornia.org), including a description of how the event sponsor will meet the event marketing assistance requirements.
4. Co-sponsorship, support or marketing assistance must have the approval of the President and, if the posting deals with a specific portfolio subject such as certification maintenance or legislation, the appropriate Vice President or Board member.
5. APA California will provide any logos, ads, etc. to be used in shared marketing to meet the strict branding requirements set by National APA.

APA California may also request the following for events that meet the criteria above:

1. The event sponsor will list APA California as a supporter of the event on all communication materials related to the event and agrees to prominently display the APA California logo as part of any event marketing materials.
2. The event sponsor will provide a source of additional information, either a document to upload, a notice, a website to link to, and contact information for APA review.
3. APA California will provide an emailed notice to members about the event, and advertise the event on the APA California website, and/or through an APA California-initiated *eNews* to members or other APA California platforms. Disclaimer Terms of Use and Privacy Statements and/or links approved by the Chapter attorney may be included in each *eNews* and webinar/event notice.
4. APA California will determine how and where subject content will be posted on the website, and APA California may edit or summarize subject content.
5. APA California will receive ad compensation or equivalent economic benefit for APA members determined by APA California to be commensurate with the marketing activity provided by APA California such as the following:
  - a. Complimentary registrations.
  - b. Registration discounts for APA California members.
  - c. Reciprocal cross-marketing privileges of similar size/scope/audience.
  - d. Payment of fees for services provided.
  - e. Distributing and displaying APA California marketing materials at the event.



## **PROVIDER COMMITMENTS**

### **NATIONAL CERTIFICATION MAINTENANCE (CM) PROVIDER COMMITMENTS (FROM THE CM PROVIDER TOOLKIT)**

*To ensure the quality of CM education for our certified planners, all organizations agree to uphold the following:*

1. Providers shall provide all services competently. Providers shall not discriminate in the delivery of continuing educational activities or the conduct of research and scholarly courses based on race or ethnicity, gender, age, religion, national origin, sexual orientation, or disability.
2. Providers shall not misrepresent the credentials of presenters, assistants, or personnel and shall inform those who are involved in the educational activities of the name of persons providing services.
3. Providers shall limit statements advertising, announcing, or marketing professional services or product promotion during the educational activity. A brief statement either at the beginning or end of the activity is permissible.
4. Providers shall ensure that their speakers reference the source when using other persons' ideas, research, courses, or products in any written, oral, or media presentation or summary.
5. Providers shall adhere to prevailing professional standards when referencing other professional entities, research results, and products.
6. Providers shall not demean any other provider or manufacturer by advertising, announcing, or marketing in any manner.
7. Providers shall not engage in dishonesty, fraud, deceit, or misrepresentation or any form of conduct that adversely reflects on the AICP CM provider system or on the profession of other manufacturers or AICP CM providers.
8. Providers shall ensure that information collected from AICP members shall be secure from unauthorized use.
9. Providers shall notify participants of any changes to the event details that have been changed from what was entered into and approved in the CM system.
10. Providers shall not charge AICP members any additional registration or other separate fee for earning CM credits.
11. Providers shall follow the following **partnership guidelines**:
  - Providers are not allowed to share their assigned Provider Account Number with other agencies, firms, companies, organizations, or individuals that are not approved by AICP CM to provide courses.
  - AICP CM provider account numbers and approved status are solely for the purpose of providing high-quality continuing education to AICP members. By allowing others to use your provider number, the quality of the education provided is compromised.
12. An approved CM provider may *partner* with non-CM provider organizations and be considered a primary partner in a program if the following conditions are met:
  - CM provider has shared the total direct costs of the program (not including consumables such as food and beverages) **or** the activity is marketed under the approved provider's brand (e.g., logo).
  - CM provider has contributed significantly to the development of the program (e.g., topic and speaker identification); **and**
  - CM provider has participated in the marketing of the program; and
  - Primary providers receive economic benefits commensurate with their financial and in-kind contributions.



American Planning Association  
**California Chapter**

*Creating Great Communities*

### **APA CALIFORNIA CO-SPONSORSHIP REQUEST FORM**

APA California requires a Co-Sponsorship Request Form for groups that are not Chapter affiliates. The CM event data must be provided on this form, the form must be approved by the Vice President for Public Information, and the Chapter will submit the details in National APA's CM dashboard for CM credit approval. The link to the form is here:

[https://docs.google.com/document/d/1f614HJp3kViGzhrC\\_nSGDcKayiOLTu0y/edit#heading=h.gjdgxs](https://docs.google.com/document/d/1f614HJp3kViGzhrC_nSGDcKayiOLTu0y/edit#heading=h.gjdgxs)



## **LIST RENTAL POLICIES**

### **USE OF MAIL AND EMAIL LIST POLICIES FOR NON-APA SUPPORTED EVENTS**

*APA California does not own the APA California mailing lists and does not rent membership lists. The lists are owned and controlled by National APA. APA California as a result adheres to the membership rental list policies of National APA (see below). All requests for rent of APA California's membership list, unless the membership list is to be used for an APA California-supported event (see criteria above), must be sent directly to National APA.*

*APA California and National APA do not rent or otherwise provide member email lists.*

### **NATIONAL APA MAIL LIST RENTAL POLICIES**

**Please read these policies before placing your order.**

1. APA's mail list may be rented for:
  - a. Promotional materials for workshops, short courses, and graduate programs relating to the planning field.
  - b. Promotional materials for publications related to the planning field.
  - c. Promotional materials for other products related to the planning field.
  - d. Announcements of job vacancies in the planning field.
2. APA's mail list **MAY NOT** be rented for:
  - a. Promotional materials unrelated to the field of planning unless permission is granted by the mailing list review committee.
  - b. Surveys, unless permission is granted by the survey review committee.
3. All lists include contact name and preferred mailing address only. Lists **DO NOT** include the contacts' phone, fax, or email address.
4. All list orders **MUST BE SUBMITTED IN WRITING AND INCLUDE A SAMPLE** of the completed promotional piece for which the list is to be used.
5. APA reserves the right not to rent its mailing list. APA must review and approve sample mailing pieces. If there is a conflict with an APA sponsored program, the list will not be released. A 60-day blackout period exists before/after our annual National Planning Conference. Please check APA's website [www.planning.org/conference](http://www.planning.org/conference) for dates.
6. Normal processing time for the list order is 5-7 business days from the receipt of the completed order form, payment, and sample piece. Rush service is available for an additional fee of \$50. If requesting preliminary counts, please allow 2-5 business days for a reply.



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7. APA does not allow its lists to be copied in any format. This includes adding APA's mail list information to a database.
8. List rentals are for one time use only.
9. The **NAME** of the American Planning Association — or **ANY** part of APA/AICP or APA Foundation **CANNOT** be included in the promotional materials.
10. All APA mail list orders must be prepaid with a credit card or check before delivery. **No exceptions.**
11. When purchasing non-custom lists, you must buy the **WHOLE** list.
12. APA **DOES NOT** provide usage information for our mailing lists.
13. APA **DOES NOT** provide merge/purge service on any of our mailing lists.
14. All lists are emailed in the requested format to the contact email address listed on the order form.

**IMPORTANT – USE OF APA DIGITAL DATABASE INFORMATION & MEMBERSHIP ROSTER UPDATES**

- American Planning Association database information is confidential and may be used only for internal Chapter and Section purposes, such as newsletter mailings, electronic newsletters, and other mailed or emailed communications from the Chapter or Sections.
- Chapters and Sections may not sell, send, trade, or give away APA digital database information.