

APA Assembly Notes

November 5-6, 2022

This digest of events summarizes the business conducted by the APA Assembly during the virtual November meeting. Full reports presented in written form can be found in the Assembly Meeting Booklet found [here](#). It is best to download or read these abbreviated notes online. They may also be printed and distributed in hardcopy (without access to the web links). You may use these notes as documented or edit and modify the content to suit your needs and interests of your District Branch. Any errors or omissions should be considered unintentional. Please send corrections and suggestions to [James A. Polo, M.D.](#)



Welcome by the Speaker – Adam Nelson, MD



Dr. Adam Nelson, MD welcomed everyone to the 97th Meeting of the APA Assembly. The Speaker's full report can be found in the Assembly Meeting Booklet on pages 15-17. Dr. Nelson introduced Dr. Magnolia Swanson, MD from the Arizona Psychiatric Society who gave the territorial acknowledgement. She noted that there are twenty-two tribes with historical roots within the territorial region of present-day Arizona. Dr. Swanson highlighted the Tahono O'odham and Pasqua Yaqui tribes with ancestral connections to the Sonoran Desert and Rio Jaqui Valley, respectively. Dr. Nelson highlighted that the Assembly has already had one in-person meeting (May 2022) and that hopefully will resume in-person meetings for the annual November Assembly meetings. Dr. Nelson acknowledged a desire to have all voices heard during the meeting with a professional tone of respect. He asked that if members agree with something that has already been said, they refrain from echoing or endorsing with their support. Instead, he prevailed on those timid voices that want to add additional information or do not agree to come forward. With this mind, he shared the Assembly Pledge that he had created for the previous May 2022 Assembly Meeting.

ASSEMBLY PLEDGE



As a member of the APA Assembly, I pledge to come to this meeting with intention to uphold and maintain my dignity and the dignity of others, to show respect to all present, and to welcome respect in return. I will collaborate in welcoming the opinions and beliefs of all present. I may disagree with those whose beliefs and opinions differ from my own, but I will do so without being disagreeable. I recognize that each of us has likely faced difficult challenges, especially with the traumas and turmoil of the past few years, while continuing to be our best personal and professional selves and to do our best for our colleagues, our profession, our patients, our families and friends, and our communities. I come to this Assembly with the commitment to uphold the core principles outlined in our APA Strategic Plan and to represent those who have chosen or elected me to be here as their voice in the APA and I will honor their concerns and interests to the best of my ability.

Report of the Speaker-Elect – Vasilis (Bill) K. Pozios, MD



Dr. Bill Pozios, MD also welcomed everyone to the November Assembly Meeting. Dr. Pozios' full report can be found in the Assembly Meeting Booklet on pages 17-20. Dr. Pozios listed the key activities that he has been involved with over the past 6 months on the AEC, as the Vice Chair of the JRC, and member of the APA Board. Dr. Pozios highlighted the importance of the recent formation of three new Workgroups. The Assembly Communications Workgroup (chaired by Dr. Pozios) is charged to develop more effective and more transparent bidirectional communication between the Assembly and District Branches as well as between the Assembly and the APA Components with the intent of maximizing existing structures where possible. The Assembly Restructuring Workgroup (chaired by Dr. Nelson) is charged to review the Procedure Code of the Assembly to include the current representational formula and other aspects of Assembly composition and structure and formulate a vision for the future of the

Assembly to represent and advocate the needs and interests of constituent members of the APA more effectively. The Social Determinants of Mental Health (SDoMH) Workgroup (chaired by Dr. Dunlap) is charged with beginning the process of creating a strategic plan to implement 2018 APA “Position Statement on Mental Health Equity and the Social and Structural Determinants of Mental Health” in coordination with the district branches. Dr. Pozios thanked Dr. Brendel and Dr. Nelson for their careful review of all Position Statements to ensure that they conform with the format outlined (Position Statement Rubric) in the Operations Manual of the APA. Dr. Pozios closed by acknowledging the efforts of the O’Leary Campaign Work Group which has the goal of endowment of the O’Leary Award for Innovation in Psychiatry. So far, \$86,085.50 of the \$150,000 goal has been pledged.

Report of Recorder – Steven M. Starks, MD



Dr. Steven Starks, MD noted that representatives from the Alaska, Missouri, Nassau-Suffolk, New York State Capital, Northern New York, Queens County, South Dakota, and Western Canada district branches were not represented at this Assembly Meeting. Even so, sufficient members were present in attendance to constitute a quorum. Minutes & Summary of Actions from the May 20-22, 2022 in-person meeting were approved by the Assembly and can be found [here](#).

Report of the Rules Committee – Dr. Mary Jo Fitzgerald, MD, Chair



Dr. Mary Jo Fitzgerald, MD presented the Special Rules of the Assembly for approval. She highlighted the changes to the Special Rules in accordance with the Assembly’s format approach for virtual meetings which can be found [here](#). She encouraged Assembly Members to refrain from using the Zoom Chat function for asking questions and making general comments. The Assembly voted to approve the Special Rules.

Report of the Nominations Committee – Dr. Mary Jo Fitzgerald, MD, Chair



Dr. Mary Jo Fitzgerald, MD announced the slate of candidates for the May Assembly Meeting. The candidates for Speaker-elect will be:



Dr. Steven Starks, MD
Texas (Area 5)



Dr. Patricia Westmoreland, MD
Colorado (Area 7)

The slate of candidates for Recorder will be:



Dr. Debra Barnett, MD
Florida (Area 5)



Dr. James Polo, MD
Washington (Area 7)



Dr. Evan Eyler, MD
Vermont (Area 1)

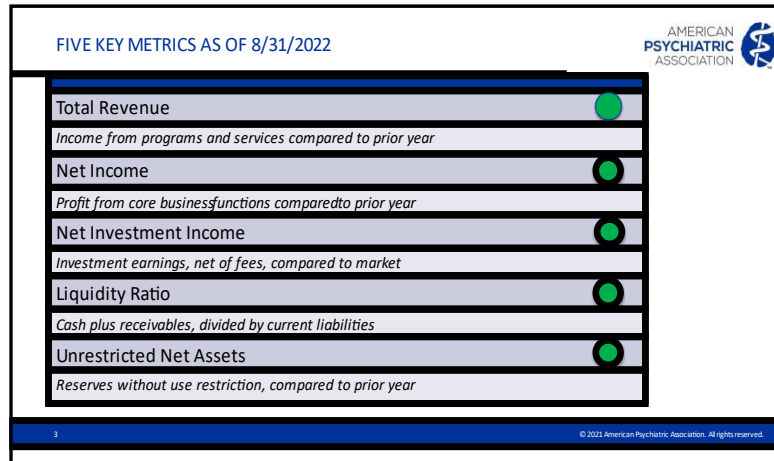


Dr. Raymond Reyes, MD
California (Area 6)

Report of the APA Treasurer – Dr. Richard Summers



Dr. Richard Summers, MD opened by highlighting that the year-to-date financial results were outperforming budget expectations. He noted that although the APA's investment portfolio shows a loss, it has still outperformed comparative benchmarks. Currently, he is forecasting a significant positive operating income. The budgeting process for 2023 is already underway. He presented the dashboard of the Five Key Metrics at a high level which are all green.



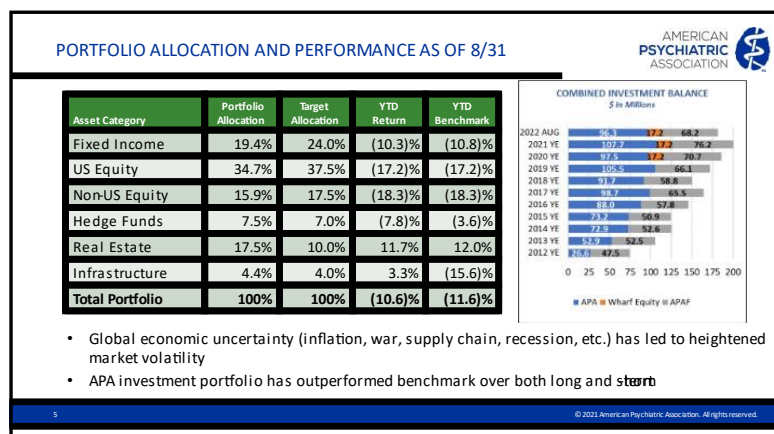
The Flash report demonstrates that Revenue continues to exceed budget expectations. The exception is conferences based on no in-person 2021 Annual Meeting. Expenses are generally performing to budget expectations. Although program spend is a little below budget, the pace will increase toward the end of Q4.

FINANCIAL FLASH REPORT

	YTD 22 Actual	% of Budget	% Inc (Dec) vs 21	Notes
Revenue				
Publications	\$ 27,223,600	94%	↑ 50%	DSM 5-TR
Membership	9,570,500	98%	↑ 4%	Higher retention to date
Conferences	8,058,700	80%	↓ 93%	No in person meeting in 2021
Federal Grants	2,241,500	63%	↓ 35%	End of research grant
Expense				
Revenue generating	\$16,657,000	67%	↑ 53%	Annual Mtg and expected pubs
Programs	9,938,500	58%	↓ 1%	End of grant
Support functions	9,788,900	69%	↑ 18%	Timing of expenses
Governance	1,238,000	48%	↑ 28%	Slow ramp up of in person mtg

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Dr. Summers also provided an overview of the APA's portfolio investments which are down, but still performing well given current global economic uncertainty.



Dr. Summers noted that the current forecast is significantly better than budget, such that there will be a positive net income without needing to access any reserve funds.

2022 FORECAST			
	2022 Budget	Forecast	Notes
Revenue generating activities, net margin <i>Programs operated at a profit to fund other activities</i>	\$ 24,103,000	\$ 31,135,900	DSM 5-TR
Programs and services, net margin <i>Member service programs, net of revenue generated</i>	(11,925,300)	(9,779,100)	Impact of APBN grants
Support functions <i>Infrastructure and other administrative services</i>	(14,091,600)	(15,265,800)	Facility pass thru costs
Governance <i>Board, Assembly, committees and components</i>	(2,572,900)	(2,266,000)	
Reserve investment funding <i>Amount defined by board policy</i>	4,350,000	0	Not needed
Net operating income (loss)	\$ (136,800)	\$ 3,834,000	

Dr. Summers closed by noting that there is high confidence in the 2023 budget revenue generating activities to offset budget expenses which should be ready for presentation to the APA Board of Trustees on December 10, 2022.

BUDGET DEVELOPMENT TIMELINE		
2023 Budget Kickoff Meeting and software opened for entry	August 15, 2022	<input checked="" type="checkbox"/>
First budget entered by departments	September 14, 2022	<input checked="" type="checkbox"/>
Budget review with Finance staff	September 19-22, 2022	<input checked="" type="checkbox"/>
Department budget meetings with CEO/COO/CFO	Sept 28- Oct 7 2022	<input checked="" type="checkbox"/>
Final budget adjustment meeting with Chiefs	October 11, 2022	<input checked="" type="checkbox"/>
Final budget proposal approved by Administration	October 21, 2022	<input checked="" type="checkbox"/>
Budget sent to Finance & Budget Committee	November 4, 2022	<input checked="" type="checkbox"/>
Presentation to Finance & Budget Committee	November 16, 2022	
Presentation to APA Board of Trustees	December 10, 2022	

Dr. Summers' report with in-depth financial details can be found in Appendix A of APA Assembly Meeting Booklet on pages 90-94

Report of the APA CEO/CMO – Dr. Saul Levin, MD



Dr. Saul Levin, MD opened his remarks commenting on the many recent media and legislative issues that undermine the psychiatric profession and the actions that the APA has taken to respond. Prime examples included responding to the editors of MDedge with respect to their discriminatory and transphobic commentary in a recent editorial titled, “The Accelerating Societal Entropy undermines Mental Health”, response to the attempts by the Florida State legislature to limit services for trans and gender-diverse youth, and response to UN considering reports of Iranian Human Rights violations related to abuse and misuse of psychiatry for ideological political purposes. Dr. Levin provided an overview of the key priorities by the APA during the lame duck period after the mid-term elections. Those include Collaborative Care Legislation, Parity Enforcement Grants, Extension of Telehealth Flexibilities, and Appropriations for Public Mental Health Programs. Dr. Levin commented on the highly successful State Advocacy Conference in October 2022. Over 100 APA Members attended to take advantage of advocacy and communications training in preparation for the 2023 session challenges and opportunities. Likewise, the Mental Health Services Conference, also in October 2022, focused on practical solutions for future challenges in mental health. Dr. Levin highlighted the new Mental Health Explainer Videos as well as enhanced partnerships to improve mental health for veterans. Information on both can be accessed online at the APA website.

MENTAL HEALTH EXPLAINER VIDEOS & VETERANS MENTAL HEALTH

Instagram Live

Shedding a Light on Veteran Mental Health

Nov. 7th @ 1:30pm ET

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WOUNDED WARRIOR PROJECT @WWP

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Dr. Levin was pleased to announce the launch of LaSaludMental.org in honor of Hispanic Heritage Month. This website will serve as a resource for Latino patients who can access mental health information in Spanish. The initial focus will include domestic violence, stigma, substance use disorders, suicide and self-harm, and depression.

A NEW APA PATIENT / FAMILY RESOURCE: LA SALUD MENTAL

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LaSaludMental.org

An APA website providing evidence-based information on mental health and substance use disorders for Spanish-speaking communities in the United States.

La Salud Mental es un sitio web que ofrece información basada en evidencias sobre salud mental y trastornos por consumo de sustancias para las comunidades hispanohablantes de los Estados Unidos.

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Dr. Levin closed by highlighting the tremendous amount of work that has been accomplished to address Structural Racism, as well as Diversity, Equity, Inclusion, and Belonging (DEIB). Dr. Levin's full report can be found in the Assembly Meeting Booklet on pages 20-36.

Rawle Andrews, Jr, JD – Executive Director APAF



Mr. Rawle Andrews, Jr. JD, provided a high-level update on the work of the APA Foundation for Q3 2022.

APAF BY THE NUMBERS – Q3 2022

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Notice.Talk.Act at Schools received a SAMSHA Grant over 5 years to expand the platform.

30 Public Psychiatry Fellows were sponsored by APAF to attend the MHSC. 6 Fellows were sponsored by APAF to attend the APA State Advocacy Conference.

FRONTLINE CONNECT initiative, funded by the Brave of Heart Fund, is focused on burnout and other client needs. The APAF Center for Workplace Mental Health's appointed Smita Das, M.D., Ph.D., M.P.H. of Lyra Health to the Advisory Council.

Received grant to support the development and delivery of Building Bridges to Care: APAF Mental Health and Faith Community Partnership (Alkermes, Inc.).

Received grant to expand the Fellowship Program (Sosozei Foundation).

On Sept. 13, the APAF and Friends of Virginia's Central State Hospital brought together psychiatrists, families, historians, and administrators at a reception to mark their recent exhibit on the history and meaning of the hospital.

The Helping Hands Grants Program provides grants of up to \$5,000 to medical schools for mental health and substance use disorder projects. 2022 recipients are from Univ. of Chicago, University of Tennessee, Univ. of Washington School, Howard University, St. George's Univ., and Rutgers NJ.

Hosted the Mental Health and Faith Community Partnership meeting at APA HQ on October 12.

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He was pleased to announce that Dr. Vedrana Hodzic, MD has accepted the position as the first Director of Fellowship, Mentorship, and Medical Education. She will start in February 2023. Mr. Andrews provided an overview of the National Mental Health Campaign. Led by the APAF, this campaign will be a nationwide, multi-year, multi-disciplinary campaign aimed at educating the public about the treatability of common mental health illnesses like depression, anxiety, PTSD, eating disorders, and grief. Mr. Andrews closed by reminding everyone to contribute to the O'Leary Award for Innovation in Psychiatry.

Please Join Us!

The O'Leary Award for Innovation in Psychiatry

Campaign Goal: \$150,000
 Raised: \$80,000 (YTD)
 First Award @ AM2023



Scan to Learn More:

To Contribute: Text **OLEARY** to **#44321**

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Report of the APA President – Dr. Rebecca W. Brendel, MD, JD



Dr. Rebecca W. Brendel, MD, JD, opened her comments by thanking members for the chance to address the Assembly. She provided an overview of work that has been accomplished in support of DEI and Structural Racism efforts, as well as work that is still in progress

DEI AND ANTIRACISM WORK

- Dashboard for SRTF Action Items (18)
 - 13 completed and monitoring
 - 5 in progress
 - www.psychiatry.org/srac
- Structural Racism Accountability Committee
 - 2021-2022 subcommittee of BOT
 - Need to engage all parts of membership
 - BOT considered multiple options and voted to reconstitute under membership committee
 - Membership and Division of Diversity and Health Equity to staff committee
 - Direct report to BOT continues
- MUR Definition Workgroup
 - Maria Oquendo MD, Past President, Chair
 - Regina James and DDHE, administration
 - Report to BOT 12/22; membership comment period; vote 3/23 BOT (anticipated)

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Dr. Brendel also provided an overview of work that has been accomplished in September and October 2022 in support of Advocacy efforts.

ADVOCACY HIGHLIGHTS

- Mental Health Parity
 - Department of Labor Roundtable September 8, 2022
 - Focus: network adequacy and payment; residential review, retrospective review
 - Future directions: work with employers
- State Advocacy Conference
 - Minneapolis, MN October 15-16, 2022
 - Panel: Advocating on Hot-Button Issues
- Telemedicine
 - Bipartisan Policy Center Telehealth Public Event October 17, 2022
 - Continued funding/ access/ parity with in-person and parity for phone-only
- Safe Prescribing
 - CATO Institute Policy Brief Release October 27, 2022
 - Can RxPs Help Solve the National Mental Health Crisis?
 - Patient Safety and Facts

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Dr. Brendel closed with an update of work accomplished in support of her Presidential Theme – Roadmap for the Future. The three key components are Access/Equity in Mental Health Care (patient/public facing), Resources for Mental Health and Workforce Development (profession facing), and Strategic Partnerships & Leadership (policy facing).

PRESIDENTIAL THEME: ROADMAP FOR THE FUTURE

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- Presidential Workgroup
 - Robert (Bob) Trestman PhD, MD, Chair
 - Administration: Kristin Kroeger and PPP team
 - Building on 2015 plan – we are the 6%
 - What we need to do NOW to PREPARE for where APA needs to be in 10 years
- Board Learning Sessions – Highlights
 - July BOT: History, Context, and Ethics
 - Sept BOT: RFM Perspectives, Workforce, Registry Data and Outcomes
- Preliminary Recommendations to BOT at December meeting
 - Discussion and feedback
 - Final report at March BOT

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Report of APAPAC – Dr. Brian Hart, MD, Chair



Dr. Brian Hart, MD provided an overview of the APA Political Action Committee. He highlighted that so far this year, \$186,421 from 1,171 contributors had been received. He noted that within the Assembly, Area 4 was leading with 63% participation. He emphasized that these APAPAC funds have been able to support 154 pro-psychiatry congressional campaigns, and more broadly in 245 races and committees. The APAPAC has invested \$411,500 toward mental health legislative champions. He asked that all Assembly members consider contributing this year to advance our collection efforts.

YOUR CONTRIBUTION MATTERS

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What's at stake:

- Expanding access to telehealth
- Mental health parity
- Legislation to address and mental health disparities
- Network adequacy
- Federal scope of practice standards
- Medicare funding
- Physician payment levels
- Residency education

Contribute today
psychiatry.org/APAPAC

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Approved APA Position Statements

The following Position Statements were approved by the Assembly: (by consent)

- 4.B.1. Proposed** Position Statement: Engaging Law Enforcement Personnel and Correctional Staff to Address Mental Health and Racial Inequities in Jails and Prisons
- 4.B.2. Revised** Position Statement: Intimate Partner Violence (IPV)
- 4.B.3. Revised** Position Statement: Endorsement of United States Ratification of the Convention on the Rights of the Child
- 4.B.4. Revised** Position Statement: Need to Train Psychiatrists in Provision of Care and Support to Individuals with Differences in Sex Development and their Families
- 4.B.5. Retire** Position Statement: Role of Psychiatrists in Assessing Driving Ability (2016)
- 4.B.6. Revised** Position Statement: Use of Jails to Hold Persons Without Criminal Charges Who Are Awaiting Civil Psychiatric Hospital Beds
- 4.B.7. Retain** Position Statement: Remuneration for Psychiatrists' Time Performing Utilization Review
- 4.B.8. Retire** Position Statement: Role of Psychiatrists in Reducing Physical Health Disparities in Patients with Serious Mental Illness (2015)
- 4.B.9. Revised** Position Statement: Use of Psychiatric Institutions for Commitment of Political Dissenters
- 4.B.10. Revised** Position Statement: Human Rights
- 4.B.11. Revised** Position Statement: Affirmative Action
- 4.B.12. Revised** Position Statement: Discrimination Against International Medical Graduates
- 4.B.13. Retire** Position Statement: Diversity (2017)
- 4.B.14. Retire** Position Statement: Psychiatrists from Underrepresented Groups in Leadership Roles (2017)
- 4.B.15. Retain** Position Statement: Health Care
- 4.B.16. Revised** Position Statement: Misuse of Psychiatric Examinations and Disclosure of Psychiatric Records in Sexual Harassment Litigation
- 4.B.17. Retain** Position Statement: Legislative Attempts Permitting Pharmacists to Alter Prescriptions
- 4.B.18. Revised** Position Statement: Mental Health and Climate Change
- 4.B.19. Proposed** Position Statement: Vaping Products and Electronic Cigarettes
- 4.B.20. Revised** Position Statement: Youth Substance Use

Approved Assembly Action Papers

Action Papers approved during this meeting included: (by consent)

- ✓ **12D** – APA Champions Firearm Safety
- ✓ **12E** – Advocating for Financial Equity and Responsibility in ABPN Certification
- ✓ **12H** – Timely Publication of the APA Presidential Address

Action Papers approved during this meeting included: (by vote after discussion)

- ✓ **12A** – Ensuring Quality of Care and Privacy as Large Organizations Enter Health Care
- ✓ **12F** – Assisted Suicide and Inability to Determine Mental Illness Irremediability
- ✓ **12G** – Observers of Psychiatric Encounters
- ✓ **12I** – Reinstate Two In-Person APA Assembly Meetings Each Year Beginning 2023

Action Papers approved during this meeting included: (with vote by strength)

- ✓ **12B** – Ensuring Reproductive and Emergency Medical Care for APA Staff and Conference Attendees
- ✓ **12C** – APA Advocates for Raising Minimum Age for Firearms Purchase

Action Paper approved during this meeting: (as an item of Old Business previously deferred to a time certain)

- ✓ **2021A2 12L** – Addressing Structural Racism in the APA: Replacing Minority and Underrepresented (MUR) Terminology with Historically Excluded Group (HEG)

You can view all current and previous Action Papers and track their current status at Action Paper Central on AITS [here](#).

Next Assembly Meeting

May 19-21, 2023 (San Francisco, California)

Deadline for Action Papers is Mar 23, 2023