APHA Affiliate Capacity-Building Initiative
Bidders Call Questions & Answers
Wednesday, July 18, 2007

1. **How should affiliates calculate travel to participate in technical assistance (TA) offered by APHA?**
   APHA has not determined the TA opportunities that will be provided to affiliates. However, for planning purposes, we suggest that affiliates budget for 2-3 trips to Washington D.C. in addition to the Annual Meetings. Since all affiliates receiving direct funds are required to attend each annual meeting during the life cycle of their grant, APHA plans to provide TA opportunities during the Annual Meeting to capitalize on the meeting opportunities.

2. **Will all the TA opportunities, offered by APHA, require extensive travel?**
   APHA plans to provide a combination of TA opportunities, such as Annual Meeting seminars, webinars, and regional seminars.

3. **How should affiliates indicate their expected timelines for completing objectives listed in the proposal, although date(s) of TA opportunities needed to achieve such objectives have not been established?**
   Affiliates should estimate the amount of time needed from the date that TA will be offered. *For example, Affiliate expects to complete their business plan within 6 months of the technical assistance webinar provided by APHA.*

4. **When and how should affiliates submit Appendix A in the RFP?**
   Appendix A is due on Friday, August 17, 2007 at 5PM EDT. APHA suggests that affiliates submitting a proposal for the APHA Affiliate Capacity-Building Initiative include Appendix A in their proposals, which are due on the same date.

5. **Is it required that the Project Manager identified in the affiliate's proposal attend the Annual Meeting(s)?**
   APHA encourages the Project Manager to serve as the primary contact representative of an affiliate's grant throughout the duration of the grant; therefore, attending the Annual Meeting would be pertinent in their role. The appointment of a Project Manager would likely enhance the communication and continuity of the grant process. If exigent circumstances occur, an affiliate can appoint another representative to attend the Annual Meeting. However, if the Project Manager identified is also the serving as the ARGC, an affiliate must appoint another representative to attend the Annual Meeting(s). ARGCs have additional responsibilities and commitments during the Annual Meeting.

6. **Should affiliates allocate funds in their budget to cover the cost for "Get Ready Campaign" materials?**
   Yes. APHA will make materials (i.e. brochures, fact sheets, etc.) available to affiliates, generally via our website. Affiliates will be responsible for the cost of their individual printing needs. APHA intends to provide the opportunity for

affiliates to personalize the materials with logo placement. However, some services (i.e. e-newsletters) will be available at no cost to affiliates.

7. **If affiliates use existing funds to cover cost for "Get Ready Campaign" materials, can that be identified as in-kind in the budget and budget justification?**
   Yes. Affiliates should indicate this allocation in the budget and explain the process that will be used in the budget justification. A financial resource, from the existing budget or incurred outside of this initiative, that affiliates use to meet the objectives of this initiative would likely be considered as an in-kind contribution.

8. **Has APHA set a percentage that affiliates should use to calculate the fringe rate in the proposed budget?**
   No. However, APHA suggests that affiliates currently employing staff use the rates for those fringes being offered now. Affiliates that do not employ staff are urged to research the fair market rate and estimate an approximate fringe rate.

9. **Can affiliates allocate funds to cover overhead costs?**
   The W.K. Kellogg Foundation does not allow overhead or indirect costs in any of its grants. Typically, overhead and indirect line items are used to cover the expenses incurred to operate a grant. It is allowable to allocate funds to cover reasonable operating expenses in this grant. Affiliates should be specific regarding their plans for such dollars (i.e. rent, utilities, bookkeeping, etc.)

10. **What is iMIS?**
    iMIS, an acronym for integrated management information system, is a software tool used extensively by non-profit organizations to manage their members and customers. The name reflects the software's core yet scalable functionality as a comprehensive membership relationship management tool.

    Advanced Solutions International (ASI), the iMIS software developer, is a global provider of software for non-profit organizations and has been serving the industry since 1991. According to the American Society of Association Executives (ASAE), 28 percent of its members use iMIS, including trade associations, professional societies, charitable organizations, social-services organizations, faith-based organizations, cultural organizations, foundations, unions, and educational institutions.

11. **What is the anticipated cost of iMIS, the membership database management system used by APHA?**
    The anticipated cost of iMIS will be $ 2,000 per year.

12. **What will APHA consider dedicated office space and equipment?**
    APHA's goal for this requirement is to assist affiliates in developing a formalized archive and establishing institutional knowledge. Hiring staff, contracting with an

independent consultant or management company, and/or a president or officer having shared equipment and a formalized process for compiling the affiliate's records and data will be acceptable for meeting this requirement.

13. **How will affiliates measure the success of the new or enhanced membership benefit that must be offered?**
    Policy & Research Group (PRG), the evaluation firm that is conducting the evaluation portion of this Initiative, will administer a Member Survey twice during the course of the grant. This tool will be used to measure the affiliate members' satisfaction with new or enhanced benefit(s). Before implementing a new benefit or enhancing a benefit Affiliates should attempt to assess what benefits would be of most value to their members. Affiliates are encouraged to implement evaluations for activities and services rendered to their members, which may also garner feedback and suggestions from affiliate members.

14. **If an affiliate is in the process of submitting a grant proposal to a foundation or governmental agency, will that satisfy the requirement set forth in the RFP?**
    Yes. Affiliates that are preparing grant applications can identify this in their proposals as the plan to meet the required objective for this initiative.

15. **Are letters of support required for the APHA Affiliate Capacity-Building Initiative grant funds?**
    No.

16. **Can affiliates allocate financial resources to support future grant writing opportunities?**
    Yes.

17. **What are the expectations or requirements for fiscal agents?**
    The APHA Affiliate Capacity-Building Initiative can only distribute funds to organizations that are designated as a 501 (c)(3). If an affiliate does not have such status, they are encouraged to solicit a fiscal agent to process the financial portion of this initiative—paying invoices, receiving and distributing all funds, etc. APHA requires documentation of the agreement between the affiliate and the fiscal agent and sound accounting measures. If necessary, a fiscal agent can assess a reasonable fee for financial management services.