
American Public Health Association POLICY STATEMENT DEVELOPMENT PROCESS

Guidelines for the Preparation, Submission, Review, Revision, Consideration, and Adoption of Proposed Policy Statements

Introduction

The policy statement development process is the mechanism by which the American Public Health Association (APHA) leverages member expertise to draft evidence-based and/or evidence-informed statements addressing issues of concern and importance to the public health community. The process is intended to develop policy statements on significant public health issues inclusive of action steps that should be taken by entities external to APHA. These adopted policy statements help to inform APHA's position on legislative, regulatory, scientific and health policy and practice issues related to public health and can be used by members to support policy priorities and actions across a variety of areas.

These guidelines, adopted by the Governing Council, are to give direction to the Association's policy statement development process by setting forth principles to govern and outline procedures to guide the coordinated participation of all parties. The Executive Board is charged to monitor operation of the policy statement development process, to assure adherence to the principles set forth here, and to report any procedural modifications adopted to facilitate the development of valid policy statements for APHA.

Role of Association Units

Constitutional and Procedural Responsibilities: Development of the policy statements of the American Public Health Association involves coordinated effort by several Association units. The bylaws define functions for specific units involved in this process as follows:

- **Section Council:** The Section Council is to consider and transmit to the Joint Policy Committee proposed policy statements (Bylaws, Article IX, Section 1(F. IV)).
- **Science Board:** The Science Board's function is to coordinate the development of the scientific basis for the APHA's professional and policy statement programs (Bylaws, Article VII, Section 5 (A)). It reviews and evaluates the evidence base of proposed policy statements.

Action Board: The function of the Action Board is to plan, organize and mobilize others to advance APHA's advocacy priorities. To this end, it shall assist in the development of a comprehensive body of policy statements for APHA; and review annually progress in promoting engagement of APHA members, Affiliates, and Caucuses in advocacy and participation in the policy statement development process (Bylaws, Article VII, and Section 1 (A)). It does this by identifying topics in need of new policy statements or gaps in existing policy statements
- **Education Board:** The functions of the Education Board are to stimulate and coordinate the education activities of APHA; to maintain and enhance professional knowledge; to increase technological proficiencies in facilitating the delivery of education; and to educate the public concerning public health issues (Bylaws, Article VII, and Section 3 (A)).
- **Joint Policy Committee:** The Joint Policy Committee (JPC) is to receive, review, hold hearings on, and present policy statements for Governing Council action. JPC shall participate in the policy statement review, updating, and archiving process and shall make recommendations to the Governing Council for changes in the Policy Statement Process (Bylaws Article VIII, Section 5 (A)).

The committee assesses all proposed policy statements, reports its initial recommendations for adoption to authors, makes recommendations for revisions to authors before submission to public hearings, reviews proposed late-breaking policy statements and recommends those that meet the criteria for hearings; organizes and coordinates the hearings; reviews the comments and

suggestions presented at the hearings and incorporates those that improve the proposed policy statements; creates a consent agenda; and reports its final recommendations for adoption to the Governing Council for its vote.

The voting membership of the JPC shall consist of 12 members: four each from the Education Board, the Science Board and the Action Board. The chairs of each of these boards shall be included in the JPC membership and shall serve as co-chairs for the JPC (paraphrase of bylaws Article VIII, Section 5 (B)).

The JPC shall select chairs for each public hearing to include one member of the JPC and one APHA staff member. The chairs of each hearing are responsible for presiding at the hearings, to take notes, and to prepare a report on the hearing to the JPC.

The JPC also oversees the association's annual policy statement review and archiving process. In coordination with the Action Board, the JPC approves the list of policy statements to be reviewed each year and recommends the list of policy statements designated for archiving to be considered by the Governing Council at the annual meeting.

- **Governing Council:** The Governing Council is responsible for adopting policy statements that articulate APHA's position on public health issues to impact legislation and regulation (Bylaws, Article V, Section 6 A)).
- **Executive Board:** The Executive Board is authorized to adopt interim policy statements, which shall be in effect until the next meeting of the Governing Council (Bylaws, Article VI, Section 7 (H)) and may commission the development of interim policy statements. The Executive Board carries out the policies of the Governing Council between annual meetings, monitors operation of the policy statement development process and implementation of policy statements.

Organizational Support: APHA's system relies heavily upon the volunteer efforts of able, interested members for the initiation and development of policy statements. All organizational constituents – sections, SPIGs, forums, Student Assembly, affiliates and caucuses – are urged to work cooperatively with authors in the development and revision of proposals within the scope of these guidelines.

Definition of Policy Statement

Each proposed policy statement should represent substantially new content with externally directed action steps, or a major modification (revision or extension) of an existing policy statement. If the new proposal updates or supersedes an existing APHA policy statement, the new proposal should explicitly call for the archiving of the older existing policy statement.

Policy statements must be consistent with APHA's goals, aims, and objectives; be relevant to current or future public health issues; and avoid conflict of interest or the appearance of conflict of interest between the author's financial or other personal interests and the goals and policies of the Association. Policy statements should describe and endorse a defined course of action, ranging from legislation and regulations desired to needed new policies of non-governmental organizations and private enterprises. Support for legislation or regulations should not include language with specific bill numbers, names, year or presidential administration so as not to date the policy statement.

Preparation

Announcement: A call to the membership for submission of proposed policy statements will be issued annually by electronic notice and in appropriate publications of the Association. Official contacts for sections, affiliates, SPIGs, caucuses, forums and the Student Assembly will be notified of the process schedule and procedures by special notice.

Origination: Any APHA individual member or group constituent is eligible to submit a proposed policy statement for consideration. Individual members are encouraged to seek endorsement from an organizational unit – section, SPIG, forum, or Student Assembly as well as from affiliates and caucuses. Collaboration is highly encouraged.

Submission: Each year the Association calendar has a deadline date for the submission of proposed policy statements. Late proposals will not be accepted. Proposals should be submitted electronically for Joint Policy Committee review to APHA's national office at policy@apha.org.

Format: Proposed policy statements should identify a public health problem and present an objective summary of the problem. Proposals should be concise, and accurately and effectively use references to justify the call for defined action by entities external to APHA. The recommended format for proposed policy statements is relatively simple, and should facilitate clear and succinct expression. APHA uses a modern, international format. Supporting evidence is presented in paragraph form, with action steps listed in clause form. Proposals cannot exceed 10 pages (1.5 line spacing) in narrative text length from the start of Section VI. Problem Statement to the end of Section XII. Action Steps and 50 references.

Procedures

Details of schedule, format, and processing considerations are subject to periodic review and revision by the JPC. Staff will provide specific information and procedural assistance upon request.

1. Preliminary Processing

Acknowledgment: Receipt of each proposed policy statement will be acknowledged by APHA staff to the person identified as its submitting originator.

Classification: Upon receipt, each proposed policy statement will be classified tentatively by staff as to subject matter and assigned to subject areas for review. The subject areas (e.g., personal health services, environmental health, personnel & training, social factors in health etc.) may vary from year to year, depending upon submissions.

Distribution: Immediately after the proposal submission deadline, copies of all submissions which appear to meet the criteria given above, will be posted on APHA's website for review by each organizational unit, all members of the Science Board and each JPC member of the Action Board and the Education Board.

2. Review and Comment

Association Constituents: Sections, SPIGS, forums, the Student Assembly, affiliates and caucuses will be notified in advance of the spring meeting of the Joint Policy Committee, that proposed policy statements are available for whatever internal review they deem desirable and feasible, and to return any comments to the Joint Policy Committee and Science Board by the deadline for consideration at the initial review of policy statement proposals during its spring meeting. Individual members may also submit reviews and feedback.

Joint Policy Committee (JPC): The Joint Policy Committee is an instrument of the Governing Council, which defines its composition and receives its reports. The JPC will consist of twelve persons; the Action Board Chair and three designees from the Action Board membership, the Science Board Chair and three designees from the Science Board membership, and the Education Board Chair and three designees from the Education Board membership, and will be co-chaired by the Chairpersons of the Action Board, Science Board and the Education Board. The Co-chairs will select members of the JPC to chair each of the public hearings.

Spring JPC Meeting: The Joint Policy Committee undertakes its first collective review of proposed policy statements at its spring meeting. At this time it: affirms initial staff classification of proposals as to type

and hearing group assignment (determined by subject area); discusses the results of preliminary review by its own individual members and any other Action Board, Science Board or Education Board members who may have commented; considers all input from individuals, sections, Affiliates, and other association units; confirms the status of submission deemed to be other than proposed policy statements (e.g. internal operations items, commemorative resolutions, technical standards, etc.); and provides an initial group assessment of each proposed policy statement.

Referral of Proposals Beyond the Scope of the Policy Statement Process: This policy statement development process is the mechanism by which APHA addresses **external** policy matters. Accordingly, submissions that are not about external policy will be deemed by the JPC to be other than proposed policy statements and will be referred as follows.

- a. Any items relating to internal operations of the Association (including APHA budget, staff and programs) will be referred to the Executive Director.
- b. Items in the nature of technical standards (e.g. program guidelines, evaluation criteria, etc.) will be referred to the Science Board.
- c. Non-policy based statements (such as commemoration of a significant event) will be referred to the Governing Council Secretary and Speaker for separate handling.
- d. Items in the nature of educational standards or professional qualifications will be referred to the Education Board.

Initial Assessment Report: After its spring meeting, the JPC will inform the author/originator/contact person of each proposed policy statement of the initial JPC assessment (see below) along with any recommendations for editing. All policy statements with their corresponding JPC assessment will be put forward for Governing Council review (unless the policy statement is voluntarily withdrawn by the author or originator).

(1) A **positive assessment:** the JPC is favorably disposed to recommend for approval essentially as submitted, and forward for a public hearing and Governing Council consideration;

(2) A **conditional assessment:** the JPC will reconsider the proposal for positive assessment before forwarding for a hearing and Governing Council consideration **ONLY** if it is:

- (a) Revised addressing the specific suggestions contained in the conditional assessment report and received by the date specified in the letter from the JPC; or,
- (b) Combined with other, related proposals into a single, succinct, proposal jointly developed by the separate authors according to the specific suggestions contained in the conditional assessment report, and revised and received by the date specified in the letter from the JPC.

(3) A **negative assessment:** the JPC suggests withdrawal of the proposal due to the number and scope of revisions that would be necessary for the proposed policy statement to meet policy statement review criteria as described in the author guidelines. A negative assessment is accompanied by specific reasons for JPC rationale. Proposals voluntarily withdrawn by the author or originator proceed no further in the current process. Proposals may be re-submitted during the next annual policy statement proposal submission process. If no correspondence is received by the JPC from authors within two weeks of receipt of JPC's correspondence of the negative assessment, the proposal will automatically be removed from the process.

If authors of proposals receiving a negative assessment wish to move the proposal forward to the hearings, they must respond to the JPC that they are **NOT** withdrawing their proposal within two weeks of receipt of this correspondence. The date will be specified in the communication from JPC. Authors of proposals with a negative assessment that notify the JPC that they are opting to move their proposal forward in the process must revise these proposals in response to JPC comments and resubmit them by the deadline outlined in the policy statement development calendar.

Fall JPC Meeting/ Second Assessment Report

The JPC will meet by conference call in mid-September to review the resubmissions and will update its recommendations to the Governing Council based on the revisions made by the proposal's author(s). Resubmitted proposed policy statements will receive one of the following assessments: positive or negative. Instructions for appeal to the Executive Board (detailed below), along with dates/times for the public hearings (if applicable) and author(s)' roles and responsibilities for the annual meeting will also be detailed.

(1) **A positive assessment-** the JPC believes the proposed policy statement is ready to move on to the public hearings at the Annual Meeting (though author(s) may be encouraged to make additional minor revisions).

(2) **A negative assessment-** the JPC believes the author(s) has not adequately addressed the recommendations for improvement provided following the initial assessment and recommends withdrawal of the proposal from the review process. A negative assessment is accompanied by specific reasons for the JPC's recommendation. Proposals voluntarily withdrawn by the author or originator proceed no further in the current process. Proposals may be re-submitted during the next annual policy statement proposal submission process. If no correspondence is received by the JPC from author(s) within one week of receipt of JPC's correspondence of the negative assessment, the proposal will automatically be removed from the process. If the author(s) of proposals receiving a negative assessment wish to move the proposal forward to the hearings, they must respond to the JPC that they are NOT withdrawing their proposal within one week of receipt of the second assessment. The date this response is due will be specified in the communication from JPC.

Also during this time the JPC and Science Board assessments, recommendations to authors and author's responses will be posted to the Policy Statement page of the APHA website. Member response or feedback regarding the proposed policy revisions or recommendations should be shared at the public hearings, held during the Annual Meeting.

Author Involvement: APHA's system relies heavily upon the volunteer efforts of able, interested members for the initiation and development of policy statements. The JPC and authors work cooperatively to accomplish any recommended revisions of proposals.

3. Optional Steps

Special Review & Comment: In addition, the Joint Policy Committee may refer proposals for special review and comment to voluntary consultants of its own choosing (i.e., Association units, public health practitioners, researchers, teachers, or others with relevant expertise and interest).

Combination: The JPC may request authors of separate (but related) proposals and others to work cooperatively together in the development of a single, succinct, jointly developed proposal.

Appeal to Executive Board of Joint Policy Committee (JPC) Decisions

The fundamental purpose of appeals to the Executive Board is to ensure that no procedural irregularities occurred in the policy making process for a specific policy proposal. The purpose is not to revisit the strength or weakness of scientific findings outlined in the policy proposal. Such scientific review is the responsibility of the JPC; it is not the responsibility of the Executive Board. Procedural irregularities could include (but are not limited to) the following: a) a disagreement about a missed deadline; b) a reviewer, Science Board, or JPC member's failure to report a conflict of interest; or c) an irregularity in Science Board or JPC voting procedures.

Appeal Submission

The author(s) of a policy that has been disapproved or combined by the JPC with another policy may appeal that JPC decision to the Executive Board. Requests for such appeal must be made in writing to the Executive Director and the Chair of the Executive Board for consideration by the Executive Board by the date and mechanism specified in the letter notifying the author of the disapproval. The information to be submitted in the appeal letter is:

1. Specific description of why the author(s) is (are) claiming that the JPC process (as outlined in the APHA Policy and Procedures) was not followed. If the author(s) claim(s) procedural irregularities, the author(s) need(s) to outline the specific departures from procedures.
2. The original proposed policy statement as an attachment;
3. The disapproval letter from the JPC as an attachment.

Appeal Distribution

The Executive Director and the Chair of the Executive Board will ensure that a copy of the appeal is sent to the JPC.

APHA staff will verify that the appeal letter was submitted on time and that the required elements, as described above, were included in the appeal letter. If these guidelines have not been followed, the appeal will not go forward.

If the appeal passes staff review for completeness, the Executive Committee (EC) of the Executive Board will review the appeal to determine if it meets the requirements for an appeal describe above. If the EC agrees that the appeal meets the criteria for an appeal, the documents will be distributed to the full Executive Board. An appeal agenda item will be added to the agenda of the next Executive Board meeting (held via teleconference). If the EC finds that the appeal does not meet the procedural criteria, the authors will be notified that that appeal will not go forward.

Appeal Review

One designated author is permitted to present verbally their case, based on criteria for their appeal, to the Executive Board. Time will be allotted for questions and answers. Five minutes will be allotted for the author to present the appealed case. An additional five minutes will be allotted for questions and answers by the Executive Board. A JPC Co-Chair will then present the view point of the Joint Policy Committee and will have five minutes allocated for questions.

Subsequently on the call, the Executive Board deliberates on the JPC appeal in executive session. (The author(s), JPC staff and JPC co-chairs may not participate in or listen to the EB decision-making process.)

The Chair of the Executive Board will communicate the Executive Board's reasons for its decision in writing to the author(s) and to the JPC within 7 days of its decision.

If the Executive Board decides to uphold the appeal, it may request the author(s) to work with the JPC and the Science Board [if appropriate] to revise and improve the proposed policy within 30 days of the date of notification of the upheld appeal. The revised submitted policy statement will then re-enter the policy process and will be included in the public hearings, reviewed by the JPC, and available to the Governing Council for the Tuesday policy statement votes.

If the Executive Board does not uphold the appeal, the recommendations of the JPC will remain.

4. First JPC Report

Official Distribution: At least a week prior to the scheduled opening of the regular annual meeting of the Governing Council, each councilor will be provided a copy of the first JPC report, consisting of the title and text of policy statement proposals as submitted (or revised), with the JPC assessment.

Membership Notice: Proposed policy statements reported out by the JPC for hearings and Governing Council consideration will be summarized in *The Nation's Health* and made available in full to the membership on the APHA website, or otherwise as appropriate and necessary.

Other Provisions

Extra-Process Adoption: Apart from the established policy statement development process defined herein, under conditions of an emergency or otherwise compelling nature, the Governing Council can vote to suspend its own rules and take up consideration of a specific proposed policy statement (e.g., one not considered by the process established herein). In such circumstances, both consideration of, and adoption of policy statements shall require affirmation by two-thirds vote of the Governing Council.

Late-Breakers: Provision is made for consideration of "late-breaking" policy statements that relate directly to important, emergent events occurring after the proposal submission deadline. The author of a proposed "late-breaking" policy statement should submit it as soon as possible. Ordinarily, the last day for submission of "late-breakers" will be ten (10) days prior to the first day (Saturday) on which the Governing Council meets each year. The Co-chairs of the JPC are the only arbiters in judging the eligibility of "late-breaking" proposals, and they will be rigorous in applying the following criteria in selecting late-breakers that will be accepted for review:

- Emergent event: Does the evidence/arguments represent a development since the current year's policy statement deadline?
- Necessity: Does APHA have an existing policy statement that already addresses the issue?
- Utility: Are the action steps in the proposed policy statement directly related to, and appropriate for addressing the issue/ problem outlined in the policy statement?
- Format: Does the submission follow the policy statement format guidelines?

All accepted "late-breakers" will be assigned to a public hearing based on subject area.

Because "late-breaking" policy statements cannot benefit from the full public and technical review of the established policy statement development process, any policy statement adopted by the Council under "late-breaking" provisions will be considered valid, but interim, policy statements -- subject to full review and reaffirmation in the next annual policy statement development cycle. The authors are expected to revise and update their "late-breaker" and submit it into the standard proposed policy statement review process the following February. APHA will send a notice after the annual meeting and then again in early February reminding authors of adopted "late-breaking" policy statements of the need for revisions, possible updates and the need for the policy statement to conform to guidelines.

Policy Shifts: Over time, any policy statement of APHA can be expected to experience incremental changes resulting in modification or updating. In such cases, APHA will default to the most recent policy statement on record. of course, the most recent explicit policy statement stands.

Policy Reversals: Ordinarily, APHA neither "rescinds" all, nor "deletes" parts of previously adopted policy statements. In the rare case of a new policy statement which effectively reverses or essentially negates all or major elements of an earlier policy statement, it may be appropriate to note, by explicit reference, that the former "supersedes" the latter.

Executive Board Policy Initiatives: The Executive Board may adopt interim policy statements that shall be in effect until the next meeting of the Governing Council. Such interim policy statements shall be posted on the APHA website and will be treated as late-breakers by the JPC at the next annual meeting.

In addition the Executive Board may commission the development of proposed policy statements. The Executive Board may request one or more organizational constituents -- sections, affiliates, SPIGs, forums, caucuses, and the Student Assembly -- to work with other APHA constituent groups and experts from outside of the Association. The Action Board should be consulted in this process and coordinate the implementation. Commissioned proposed policy statements may be adopted by the Executive Board as interim policy statements or may be directly submitted into the policy statement development process. If adopted by the Executive Board as an interim policy statement such a policy statement must be voted on by the Governing Council at its next meeting whether or not it has gone through the formal policy statement development process. If it has not gone through the formal policy statement development process and is approved by the Governing Council, it will be treated as an approved late-breaker.

Public Hearings

Assignment and Scheduling: Each proposed policy statement will be grouped by subject area for review. Each subject area will then be assigned a public hearing.. The subject areas to be handled at each hearing (e.g., personal health services, environmental health, personnel and training, social factors in health etc.) may vary from year to year, depending upon submissions. Public hearings on proposed policy statements will be held at the time of the annual meeting. Each public hearing is intended as the open forum provided for detailed exploration, discussion, and debate of assigned proposed policy statements. These public hearings will be scheduled and published in the annual program so as to provide reasonable opportunity for input from all interested parties during the APHA annual meeting prior to the Joint Policy Committee's final meeting.

Testimony: Any member of the Association is permitted to present relevant oral or written testimony at these public hearings; however, the hearing chair may limit debate if circumstances warrant. Representatives of sections, SPIGs, forums, Student Assembly, caucuses, affiliates and Governing Councilors with special interest in specific proposals are urged to participate in these hearings. An originator of each proposal is expected to be present at the public hearings to answer any questions that may arise regarding their proposal. Any modifications or wording changes must be submitted in writing prior to the conclusion of the hearing in order to be considered.

JPC Authority: At the conclusion of the public hearings, the JPC is assigned responsibility and authority for determining the final content (i.e., scope, structure, wording, emphases, title, etc.) of proposed policy statements. Also at this time, the proposed statements are owned by APHA.

Final JPC Report

JPC "Mark-Up" Session: After the public hearings, but before submitting its final report to the Governing Council, the Joint Policy Committee will schedule a "mark-up" session. This will be a closed meeting of the committee in executive session, usually scheduled for all day on Monday. With regard to each proposed policy statements, at this final "mark-up" meeting, the JPC will review recommendations from the public hearings including any changes agreed to by the author(s) of the proposed policy statements during the hearings, and any additional relevant information. The JPC will then prepare its final report to the Governing Council. JPC makes every effort to contact the author about additional changes after the hearing and explains the rationale for those changes.

Form and Content: The JPC will draft a final report to the Governing Council, consisting of its precise recommendations for Governing Council action on proposed policy statements on which hearings were held, utilizing a format which facilitates ready identification of any changes recommended from the proposed policy statements officially distributed to Governing Council. The report will also include the proposed "consent agenda" — those proposed policy statements around which the JPC has reached consensus with both positive and negative recommendations provided. The JPC shall also have available upon request a brief summary of any changes suggested during the hearings whether or not they are

recommended by the JPC in its final report. Every effort will be made to deliver the final JPC recommendations to Governing Councilors prior to scheduled consideration.

Consent Agenda: The JPC will first report to the Council the proposed consent agenda which lists, by title, those proposed policy statements it recommends to Governing Council for adoption or rejection, and relative to which it believes there is a consensus of opinion about how the proposal policy statement should proceed. Late-breakers are not included in the consent agenda.

The simple request (without explanation) of any Governing Councilor will result in the removal of any title(s) from the consent agenda as proposed by the JPC. After reasonable time, and without further discussion, the Speaker of the Council will call for the adoption (or rejection) of all proposed policy statements remaining on the consent agenda, by majority vote of the Governing Council.

Separate Consideration: The JPC will then present (in a rational sequence of its choosing) its final recommendations for each remaining proposed policy statement not already adopted or declined by majority vote.

The committee's presentation will initially be limited: (1) to summarizing any changes in JPC recommendations since its previous report to the Council, (2) provide recommendations on accepted late-breaker proposed policy statements and (3) to explaining briefly its reasons for its recommendations. Subsequently, JPC representatives will be given opportunity to elaborate in response to questions or challenges raised from the floor of the Governing Council. For a proposed policy statement that is not recommended by the JPC, the Governing council may vote to approve it, to decline it or mandate its return to the Science board the following year for additional review depending on the nature and completeness of a proposed policy statement.

Post Approval

Publication: Policy statements adopted by the Governing Council will be posted on the APHA website. Notification will be provided to the members through the usual Association channels. Staff will maintain a compendium of APHA policy statements, and updated versions periodically published, as determined by the Executive Board.

Reaffirmation Of Late-Breakers and Policy Statements Approved Through The Extra Process

Adoption Process: Because "late-breaking" proposed policy statements or policy statements passed under a suspension of the rules cannot benefit from the full public and technical review of the established development process, any policy statement adopted by the Council under "late-breaking" or "extra process adoption" provisions will be considered a valid, but interim, policy statement -- subject to full review and reaffirmation in the next annual policy statement development cycle.

Policy Statement Review, Updating and Archiving: Over time, any policy position of APHA can be expected to experience incremental changes as the details of new policy statements bring marginal modification. Ordinarily, APHA neither rescinds all, nor deletes part of previously adopted policy statements, but rather archives those the Governing Council agrees are no longer current. See following Section for policy statement archiving process.

Archiving Process for Active Policy Statements

Over time, policy statements become out of date and not reflective of current science or the current environment. The goal of the policy statement archiving process is to archive policy statements that are no longer current and to identify important policy statements that need to be updated and submitted to the annual policy statement development process. Policy statements approved for archiving by the Governing Council are noted as archived in the APHA policy statement database, meaning they no longer guide APHA policy and practice, but serve as historical documents.

Automatic Archiving Process for New Policy Statements Adopted after 2013

- New policy statements beginning in 2014 will be automatically scheduled for archiving after 10 years.

Automatic-Archiving Process for Active Policy Statements 20 Years after Adoption

- Beginning in 2019, all active policy statements will be automatically scheduled for archiving (i.e. moved to the policy statement archive) 20 years after adoption.
- In 2019, all active policy statements adopted in 1999 and earlier will be scheduled for archiving. In each following year, a year's worth of policy statements will be considered for archiving.

Archiving Review

Starting in 2017, APHA will announce the policy statements scheduled for archiving two years in advance of the archiving vote. This announcement will be made when the policy statement gaps for the upcoming cycle are released.

Beginning in 2019, all active policy statements 20 years or older will be automatically archived following the Annual Meeting and beginning in 2024 all active policy statements 10 years or older will be automatically archived following the Annual Meeting unless requested to be kept active per Scenario 3 below. No policy statements will be allowed to be taken off this archiving consent agenda at the annual meeting.

Then the Governing Council will consider the Science Board's recommendations regarding the policy statements that were removed from the 10 or 20-year archiving consent agenda prior to the annual meeting. Prior to the vote, a Governing Councilor may remove any statement from these recommendations for an individual vote to counter the Science Board's recommendation. The Governing Council will then vote on the remaining policy statements with Science Board recommendations. Finally, the Council will vote on each of the policy statements where a counter recommendation has been made.

Note that members can submit a new proposed policy statement following the policy statement development guidelines on issues covered in any policy statement that has been archived at any time in the future, as long as it is relevant to current or future public health issues. Any new proposed policy statement must be submitted through the normal policy statement development process.

As policy statements are scheduled for archiving, all Governing Councilors and APHA membership will be asked to review the statements relevant to their constituencies and consider three potential options for each policy statement of interest:

- Scenario 1: Allow the policy statement to be archived. Any policy statements that do not fall under scenario 2 or 3 will be automatically archived following the Annual Meeting.
- Scenario 2: Update a policy statement scheduled for archiving. A list of policy statements scheduled for archiving within two years will be posted on the policy statement development process page on the APHA website and shared through other APHA member communication. APHA members will have two cycles to submit updated policy statements during the annual policy statement development process before the original policy statement is archived. Policy statements submitted to update an existing policy statement scheduled to be archived will follow the regular policy statement development guidelines and process. Once archived, policy statements may still be updated at any time via the regular Policy Statement Development Process.

- **Scenario 3: Request to keep active a policy statement proposed for archiving.** If an APHA member believes that a policy statement scheduled for archiving is still current, they can submit a special request to the Science Board for review of the science, references and action steps of the policy statement set to be archived. A rationale for keeping the policy statement active and removing it from the consent agenda for archiving must accompany the request. Such a request must be submitted by June 1 of the year when the policy statement is scheduled to be voted on for archiving. Each request will be reviewed by the Science Board (consulting additional volunteer content experts from relevant APHA components as needed) and be given recommendation either to archive the policy statement as scheduled or keep it active. The Science Board chair will then present the recommendations on the consent agenda to the Governing Council for a vote.

The following proposed steps refer to Scenario 3:

In an effort to ensure a user friendly and transparent process for APHA members and staff, the following steps are suggested to address policy statements that have been deemed current by an APHA member through a special request to the Science Board (via the Governance Liaison):

Step One

- APHA Governance Staff will review the special request to ensure rationale is complete and specifically speaks to the current relevance of policy
 - Description must include support that the science, references, and action steps are current (**not more than one page**)
 - The Special Request should NOT include any suggested updates. If it does, the member submitting the form will be asked to submit the update through the regular policy proposal process in the coming year.

Step Two

- Science Board Members review the request coordinating with Sections to consult content experts as needed
 - Science Board will review comments for each submitted request and provide an Archive of Keep Active decision for each request reviewed.

Step Three

- Science Board chair will report to Governing Council with archiving consent agenda

Future

- All policy statements deemed as current will be reviewed annually.

Adopted by the 1985 APHA Governing Council
Amended by the 1988 APHA Governing Council
Amended by the 1990 APHA Governing Council
Amended by the 2002 APHA Governing Council
Amended by the 2003 APHA Governing Council
Amended by the 2007 APHA Governing Council
Amended by the 2011 APHA Governing Council
Amended by the 2013 APHA Governing Council
Amended by the 2016 APHA Governing Council
Amended in October 2017 with new Executive Board appeal process
Amended by the 2017 APHA Governing Council
Amended by the 2019 APHA Governing Council