



Affiliate Standards Overview

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Introduction

This overview of standards and measures for Affiliates reflects the standards from the former Affiliate Self-Assessment Tool. Affiliates can use this guide alongside the restructured Affiliate Annual Report survey and the Affiliate Advocacy & Policy Survey to clarify points within the surveys, help with strategic planning and identify areas of accomplishment and improvement.

Background

Like the Self-Assessment Tool, the purpose of this overview is to help evaluate Affiliates' organizational capacity against a set of common standards and principles. Utilizing the annual report, the advocacy & policy survey and this overview will provide Affiliates with a composite view of their strengths and weaknesses. Use this overview when reviewing Affiliate Bylaws and updating strategic plans.

Where strengths are identified, Affiliates are encouraged to share their expertise by contributing materials to the Affiliate Online Community (<https://affiliates.apha.org>) library to share with other Affiliates.

If your Affiliate has room for improvement, look to Affiliates in your region, in the AOC or Affiliate Affairs staff for steps you can take to get stronger.

Notes

Measures marked with an asterisk (*) do not apply to all Affiliates.

We recommend revising and updating the standards and measures as needed to ensure effectiveness.

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Domain 1: Organizational Competencies

Maintain and improve administrative capacity to support public health.

Standard 1.1 Leadership & Governance

Maintain operational definitions and statements of leadership & governance roles and responsibilities.

Measure 1.1.1

Provide organizational structure for elections, legislative priorities, special committees, orientation programs and day-to-day oversight.

Measure 1.1.2

Develop a succession plan and provide information to leaders/governing body about their overall obligations and responsibilities.

Measure 1.1.3

Ensure and maintain management capacity through hiring or contracting an Executive Director and provision of information of their role and responsibilities.

Standard 1.2 Legal

Maintain Affiliate operations by accessing and using appropriate legal services to relevant administrative rules and due process.

Measure 1.2.1

Have incorporated as a 501(c)(3), 501(c)(4) or comparable organization. Ensure filing of IRS Form 990.

Measure 1.2.2

Purchase general liability and governing body insurance.

Measure 1.2.3A

Maintain and review a signed Memorandum of Understanding with APHA.

Measure 1.2.3B

Maintain signed Conflict-of-Interest disclosures for each governing body member.

Measure 1.2.3C

Maintain and review signed contracts for all service providers, grants and awards.

Measure 1.2.4

Develop and conduct an annual review of bylaws and articles of incorporation information.

Measure 1.2.5

Create and register an organizational logo.

Measure 1.2.6

Establish and maintain an accurate recordkeeping system of Affiliate documents.

Measure 1.2.7*

For staffed Affiliate organizations: maintain OSHA requirements for work conditions and employee safety.

Standard 1.3 Financial

Establish effective financial management systems as they pertain to grants and budget.

Measure 1.3.1

Develop and maintain an Income Statement and Balance Sheet monthly, and annual budget with a break even or better bottom line.

Measure 1.3.2

Maintain a successful grant recordkeeping, accounting, administration, program and completion system.

Measure 1.3.3

Maintain compliance with written procedures and principles including an independent financial review at least every three years.

Measure 1.3.4

Provide a web-based payment option for membership, with incentives for early renewal. Provide leadership travel reimbursement and authority to purchase on behalf of the organization. Have and be able to share Tax ID, form templates, evaluations, cash reserve and transfer of authority.

Standard 1.4 Workforce Development

Maintain a competent workforce to better support public health.

Measure 1.4.1

Provision of supportive work environment including, but not limited to, physical space (e.g., for annual meetings) and necessary equipment for the operations of the Affiliate.

Measure 1.4.2

Provision of information regarding staff duties and hires for other support services.

Measure 1.4.3*

Ensure a competent staff through provision of orientation, continuous training and other human resource functions.

Standard 1.5 Information Technology

Establish and maintain communication and technological measures for the organization.

Measure 1.5.1

Maintain a communication mechanism, software packages and teleconferencing technologies.

Domain 2: Partnership Development

Develop key partnerships to encourage public health engagement.

Standard 2.1 Strategic Partners

Engage with public health partners and community groups to promote public health and address issues.

Measure 2.1.1

Provide operational and financial support for sections and special interest groups within the Affiliate.

Measure 2.1.2

Establish formal agreements and networks with other organizations, strategic partners and local members of APHA.

Measure 2.1.3

Offer recognition of legislators, leadership and partners.

Standard 2.2 Membership

Develop and promote opportunities to increase membership engagement.

Measure 2.2.1

For recruitment and retention, utilize:

- a leadership pipeline within your organization,
- APHA membership lists, including
 - APHA member list by state (summer)
 - APHA agency and student bulk members by state (winter)
 - APHA Annual Meeting attendees by state (fall),
- members recruitment and retention plan,
- social media, and
- recognition measures.

Measure 2.2.2

Conduct an annual business meeting.

Measure 2.2.3

Conduct an annual membership survey.

Measure 2.2.4

Provide engagement opportunities for members to:

- practice skills,
- present at your annual meeting,
- participate in the governing body,
- engage with academic members,
- be in mentorship programs,
- network throughout the year,
- be recognized in an awards program, and
- learn from educational webinars and policy trainings.

Measure 2.2.5

Provide mechanism for sections/SPIGs to report regularly to full membership.

Standard 2.3 Students

Engage with public health students to promote public health, address health problems and develop a competent workforce.

Measure 2.3.1

Provide opportunities for interns and early career professionals to serve on committees and work on Affiliate activities.

Measure 2.3.2

Seek opportunities to fund student-led projects.

Measure 2.3.3

Request APHA Student Assembly leadership to appoint a student liaison to the student assembly.

Domain 3: Advocacy & Policy Support

Advocate for public health policies and plans and serve as an expert resource for public health policies, practices and capacities.

Standard 3.1 Advocacy

Relationship-building with elected officials and internal advocacy awareness-building for members.

Measure 3.1.1

Engage with elected officials, participating in the Speak for Health campaigns and attending town halls and Legislator Appreciation Day to raise Affiliate visibility.

Measure 3.1.2

Develop resources for elected officials, conduct activities to engage the public and provide an advocacy toolkit and training to members.

Standard 3.2 Policy

Monitor public health-related legislative agenda items and conduct appropriate responses.

Measure 3.2.1

Establish and publish an annual legislative agenda and policy statements.

Measure 3.2.2

Identify at least one member as a spokesperson for each policy issue and who monitors state legislation to keep members informed.

Measure 3.2.3

Define a role for policy interns as a means of developing the public health workforce.

Measure 3.2.4

Define Affiliate communication around policy and advocacy.

Domain 4: Communications

Maintain ongoing relations to communicate directly with local community and partners.

Standard 4.1 Organization

Internal and external organizational measures.

Measure 4.1.1

Develop an annual calendar of deliverable dates and a Member Recruitment and Retention Plan.

Measure 4.1.2

Establish relationships with state and local media. Provide training and resources for advocacy and how to work with the media.

Measure 4.1.3

Create and implement a Communication Plan.

Standard 4.2 Social media

Engage with community and key partners through social media.

Measure 4.2.1

Actively use social media to promote public health issues and support member participation.

Standard 4.3 Website

Establish and maintain of a website to engage with the public.

Measure 4.3.1

Establish, review and update policies for the website, privacy, security, content, members-only database and web technologies/applications. Designate a webmaster and provide a description of their responsibilities.

Measure 4.3.2

Create a logo to communicate the Affiliate's brand.

Measure 4.3.3

Utilize APHA tools effectively.

Measure 4.3.4

Utilize APHA's "Affiliate of the American Public Health Association" logo on website.

Domain 5: Equity, Accountability & Performance Management

Integration of accountability in equity and performance management within the Affiliate.

Standard 5.1 Equity

Promote justice, equity, diversity and inclusion throughout the Affiliate.

Measure 5.1.1

Affiliate's mission, vision and goals intentionally and explicitly address and embrace justice, equity, diversity and inclusion as defined in the latest JEDI toolkit.

Measure 5.1.2

Have an explicit policy that encourages a diverse pool of candidates to consider serving on your board and support this through a mentorship pipeline.

Measure 5.1.3

Implement JEDI actions such as land acknowledgement statement before meetings, declaring racism as public health crisis, or updating bylaws include explicit language that demonstrate the organization's commitment to inclusive practices.

Standard 5.2 Organization

Administrative measures regarding elected and appointed leaders.

Measure 5.2.1

Maintain a process for governing members who do not attend meetings regularly and identify voting members and quorum.

Measure 5.2.2

Provide descriptions of elected and appointed position responsibilities.

Measure 5.2.3

Provide a mentor to newly elected leaders.

Measure 5.2.4

Provide an annual report to members including financial status, strategic goals and participation in APHA initiatives.

Standard 5.3 Accountability

Evaluation and review of procedures and leadership.

Measure 5.3.1

Review bylaw changes, finances, member recruitment and retention and awards at the annual business meeting.

Measure 5.3.2*

Maintain a procedure for annual review of the Executive Director.

Standard 5.4 Performance Management

Implement tools to track performance.

Measure 5.4.1

Develop an annual work and business plan for each committee and staff group.

Measure 5.4.2

Develop and implement an annual retention plan for staff and volunteers.

Measure 5.4.3

Update the strategic plan every three to five years and a detailed review of the strategic plan at least quarterly.

Measure 5.4.4

Establish and monitor performance metrics.