Executive Summary

*Prepared by Brighter Strategies, LLC
for the American Public Health Association*

INTRODUCTION

Throughout our research with the American Public Health Association (APHA) we heard one repeated theme – that everyone feels they have a "home" at APHA. However, members' experiences vary dramatically in terms of communications, efficiency, professional development opportunities, collaboration, and contributions to advancing public health.

APHA hired Brighter Strategies, LLC to conduct the Member Unit Effectiveness and Engagement Project in order to assess the composition of APHA's 38 member units (Sections, Forums, and SPIGs). The goal of the assessment was to include a review of the member unit organizational structure, internal governance and operational processes. Specific goals include examining the capacity, performance, motivation, learning, professional environment and member experience.

We chose to frame our research and recommendations using Falletta's Organizational Intelligence Model (Falletta Model). This science-based, change-oriented model provided us and APHA with a framework to facilitate the design and interpretation of the member unit effectiveness and engagement assessment effort. The model looks at five key organizational capabilities that lead to engagement.

The five indices we looked at over an extensive, year-long feedback process were:

1. **Structure**

2. **Communication and information technology**

3. **Volunteer leadership**

4. **Measurement (or performance)**

5. **Growth and development (learning and professional growth)**

We have collected feedback on each of the five indices and prepared recommendations for improving member engagement and satisfaction with APHA.

In this summary we will cover:

- **Overall Member Findings**

- **Area-Specific Findings**

- **Implementation Guidance**

- **Recommendations**

Each area is covered in greater detail in the complete report.

OVERALL MEMBER FINDINGS

Overall, APHA member perceptions are more positive than negative. However, issues of communication, engagement, transition, and metrics were visible in all five studied areas. Members more strongly support recommendations related to communications, member engagement, growth and development, and metrics and rewards than they do a structural change.

Although structural change is needed, we believe it should occur in a long-term, phased-in approach with careful effort to ensure that current members do not feel disenfranchised by the change.

Some of our recommendations can be introduced quickly, with little effort. With others, APHA will need to make decisions based on potential impact and resources required to implement the changes. There will be quick wins, which can occur in the initial six months, and other components that might take years to unfold.

A chart with all recommendations, color-coded by time, cost, member support, and impact is attached at both the end of this summary, and the end of the report.

KEY FINDINGS BY SUBJECT MATTER

Communications & Information Technology

- Membership lists are not easily accessible to members in a way that allows members to find peers with similar interests.
- New members are lost and need more onboarding assistance.
- Members are either unaware of APHA Connect, or find it difficult to use.
- APHA is too reliant on section leaders to communicate information.
- The method/tool used for communicating within sections is highly variable.
- Members want to be able to communicate easily while setting their own controls for access and timeliness of digests/information pushed from APHA.

Volunteer Leadership

- The success of the volunteer leaders at APHA has a significant impact on the overall functioning of the member unit, which varies widely.
- Member perceptions of the overall quality and processes of leadership are more positive than negative on the whole.
- Many members are unaware of who their leaders are or what they do.
- Leaders feel they need more guidance and support from APHA.

Measurement and Rewards

- Members feel that units should not be rewarded for size, but a combination of overall engagement, developing and executing a strategic plan, alignment with APHA's strategic plan, and collaboration across member units.
- APHA members have a great appreciation for the recognition of their efforts and believe expanding recognition could reinforce and increase member engagement.

Member Growth and Development

- Members agree that engaging with the APHA community provides them with relevant new skills and knowledge in public health.
- Members indicate that they have developed new professional contacts and relationships because of APHA.
- Members would like to see APHA increase its advocacy capacity.
- Members would like increased mentoring programs.
- For those in the Student Assembly, there is no clear transition point or pathways to connect to the rest of APHA.

Member Engagement

- Members engage with the association to:
  - network at the annual meeting.
  - learn about new issues.
  - use APHA as an advocacy vehicle.
  - energize people about public health.
- 73% of members are planning on renewing their APHA membership.
- The annual meeting is seen as a top strength of APHA.
- Members would like additional opportunities to meet and connect with each other.
- New members find it especially difficult to initially engage with APHA.

APHA Structure

The current structure:

- is wide-reaching, providing multiple places for people to belong.
- is complex and difficult for members, especially new members, to navigate.
- is unclear to members when they join.
- does not maximize APHA's ability to facilitate focused and comprehensive progress on any specific issue.
- does not have the flexibility to address emerging issues.
- could benefit from more focus on public health professionals employed at state and local agencies and those focused on infectious diseases.
- makes cross-sectional work difficult.
- limits timely collaboration around current public health issues.

RECOMMENDATION IMPLEMENTATION GUIDANCE

Although we have organized recommendations based on anticipated time and results, APHA leaders and staff will need to prioritize recommendations. APHA leaders and staff will be faced with the need to navigate both member acceptance and broader organizational change. In this work, it is important that a strong business case for change be made to staff and membership, that a clear change management strategy is put in place, and that APHA is able to track and monitor the success of the plan.

Typically change management/implementation work, involves the following steps:

Making the case for change
Create a bi-directional communications plan

Educate and establish internal champions for change
Define a change management strategy

Facilitate a strategy that supports the desired change
Draft an implentation plan

Establish clear and consistent communications
Communicate the impact of the change work

Support the change effort
Implement, track and manage the work

Celebrate the wins
Reinforce the change

Step 1: Making the case for change

APHA will need to create a proactive 18-to-24-month communication and outreach plan that speaks to multiple audiences.

Step 2: Educating and defining internal champions of change

APHA will need to champion an internal group to spearhead and advocate for this work. We understand this group, consisting of key APHA staff, as well as Volunteer Leaders and some members of the Member Unit Effectiveness and Engagement (MUEEP) Advisory Committee, has already been formed.

Step 3: Facilitate a strategy that supports the desired change

The working group should develop an implementation plan that facilitates a strategy to support recommendations.

Step 4: Establish clear and consistent communications

We know from the "20-60-20 rule" that about 20% of people will be early positive adopters, and another 20% will resist and be negative from the outset. Our goal is to work with, and communicate to, the 60% who are "on the fence."

Step 5: Support the change effort

The working group will need to actively track both successes and failures and course correct in real time. In this step, the working group will be engaged in gathering feedback, determining final priorities and implementation plans, and obtaining final approval of implementation objectives as needed.

Step 6: Celebrate the wins

In the final step, but also throughout the project, the goal should be to reinforce any changes completed by institutionalizing them. This can be done by providing regular ongoing training, codifying materials in new policies/procedures and rewarding compliance so that staff and volunteer leadership are working from the same page. Sharing these "wins" through the APHA communication channels and ensuring they are publicly acknowledged will also be important.

CONCLUSION

Over the last year, we had the honor of spending many hours with APHA members, staff, and other public health experts to identify recommendations in service of creating a more effective and efficient organization. Although some of the recommendations require a significant investment of staff resources and money, and others may take many months or even years to yield results, others can be implemented easily and quickly. The next steps—the process of choosing recommendations, implementing some quickly while solidifying details needed to effectively execute others, and methodically managing the change—is critical to success. We are confident the end result will be a better member experience and ultimately, a stronger organization in serving its members and collectively advancing public health.

SUMMARY OF RECOMMENDATIONS

TIME	🕐	Implementation could take 1-6 months.
	🕐	Implementation may take 6-12 months.
	🕐	Implementation may take 1-3 years.
IMPACT ON APHA STAFF	👤	If the recommendation is implemented, staff will engage in a short-term project, or management of a consultant (e.g., web developer), and/or the recommendation will reduce work for staff in the long-run.
	👤	If the recommendation is implemented, a medium amount of work will be created for the staff over the long-term (e.g., coordination of more unit volunteer positions over the long term).
	👤	Execution of this recommendation will require significant effort from staff over the long-term and should be built into job descriptions and roles. This might also include hiring additional staff.
COST	$	Staff supported implementation that will require little to no financial investment
	$	Small financial investment will be required, likely under $20,000
	$	Significant financial investment will be required, likely over $20,000 A note on financial burden vs. staff: in some cases, the financial burden could move from a staff cost (people) to a consultant cost (dollar sign), depending on how APHA chooses to implement. For the purposes of this analysis, we consider a long-term projects as staff responsibilities.
MEMBER SUPPORT	👍	Our data suggests over 75% of members agree with this recommendation.
	👍	Our data suggests 60% - 74% of members agree with this recommendation.
	👍	Our data suggest 45-59% of members agree with this recommendation.
QUICK WINS	No more than two "yellow" categories; no recommendations are "orange"	
HIGH IMPACT EARLY INVESTMENT	Member support is green, but at least one category is orange, or all three other categories are yellow.	
LONG-TERM PROJECT	Member support is orange or yellow. We recommend APHA take several steps to gain member support before successfully implementing this recommendation or consider the recommendation optional and lower priority than those above.	

RECOMMENDATIONS	TIME	IMPACT ON STAFF	COST	MEMBER SUPPORT
Quick Wins				
(Communications) Ensure information on each unit, subunit, strategic goals and activities, and how to get involved is readily available to both current and new members.	🕐 green	👤 green	$ green	👍 green
(Volunteer Leadership) Create a transfer of institutional knowledge process between outgoing and incoming leaders.	🕐 green	👤 green	$ green	👍 green
(Volunteer Leadership) Create a clear and transparent process to help elected leaders unable to deliver to step down and for a new leader to be elected.	🕐 green	👤 green	$ green	👍 green
(Communications) Create and communicate guidance for internal communications.	🕐 green	👤 green	$ green	👍 yellow
(Member Engagement) Provide leaders with a monthly or quarterly list of new members to support outreach.	🕐 green	👤 green	$ green	👍 yellow
(Communications) Create an easily accessible and user-friendly landing page for APHA members.	🕐 green	👤 green	$ yellow	👍 green
(Communications) Create a structured process to onboard new members focusing on navigating APHA and getting value out of their membership.	🕐 green	👤 yellow	$ green	👍 green
(Volunteer Leadership) Educate members about who their leaders are and what they do.	🕐 green	👤 yellow	$ green	👍 green
(Volunteer Leadership) Provide more information about potential leaders on election day.	🕐 green	👤 yellow	$ green	👍 green
(Member Engagement) Conduct more interactive meetings.	🕐 green	👤 yellow	$ green	👍 green
(Volunteer Leadership) Provide current and potential leaders more guidance through a member unit level leader handbook.	🕐 green	👤 green	$ green	👍 yellow
High Impact Early Investments				
(Member Engagement) Collect data at the time of registration to understand new members' interests, and follow-up with connections to the appropriate APHA member unit/leaders.	🕐 green	👤 orange	$ yellow	👍 green
(Growth and Development) Create a rapid response system.	🕐 yellow	👤 orange	$ green	👍 green
(Growth and Development) Build additional state/local advocacy strength and provide guidance on a coordinated strategy with local advocates.	🕐 yellow	👤 orange	$ green	👍 green
(Growth and Development) Build on APHA's strength with federal advocacy so that APHA can elevate its voice at the national level.	🕐 green	👤 orange	$ yellow	👍 green
(Growth and Development) Develop a comprehensive approach to connecting members with mentors.	🕐 yellow	👤 orange	$ yellow	👍 green
(Communications) Replace APHA Connect with a more user-friendly tool.	🕐 yellow	👤 orange	$ green	👍 green

Long-Term Projects

Project	Time	Staff	Cost	Feasibility
(Member Engagement) Hold regular (monthly/quarterly) orientations for new members.	🕐 green	👤 yellow	$ green	👍 yellow
(Member Engagement) Within the units, announce new members on a monthly or quarterly basis.	🕐 green	👤 green	$ green	👍 orange
(Volunteer Leadership) Hold more leader-to-leader events.	🕐 green	👤 yellow	$ green	👍 yellow
(Volunteer Leadership) Hold more regular opportunities to engage with leaders.	🕐 green	👤 yellow	$ green	👍 yellow
(Communications) Create more unit liaison roles to help with cross-cutting goals and priorities.	🕐 green	👤 orange	$ green	👍 yellow
(Communications) Create a communications specialist volunteer position in each unit	🕐 green	👤 yellow	$ green	👍 orange
(Member Engagement) Have a specific staff position established to direct and guide new members.	🕐 green	👤 orange	$ green	👍 yellow
(Growth and Development) Ensure the APHA Annual meeting encourages qualitative research presentations equally.	🕐 yellow	👤 yellow	$ green	👍 yellow
(Growth and Development) Facilitate more peer learning opportunities with experts.	🕐 green	👤 yellow	$ yellow	👍 yellow
(Growth and Development) Offer virtual speed mentoring programs throughout the year.	🕐 green	👤 yellow	$ green	👍 orange
(Measurement and Rewards) APHA should diversify "rewards."	🕐 green	👤 yellow	$ yellow	👍 yellow
(Structure) Implement a system of sunsetting units if they represent a topic that is no longer relevant or have continued low levels of engagement.	🕐 orange	👤 yellow	$ green	👍 yellow
(Volunteer Leadership) Provide more targeted leadership training.	🕐 yellow	👤 orange	$ green	👍 yellow
(Measurement and Rewards) Units should be rewarded for community action.	🕐 yellow	👤 orange	$ green	👍 yellow
(Measurement and Rewards) Units should be rewarded for promoting the vision of APHA.	🕐 orange	👤 yellow	$ orange	👍 yellow
(Member Engagement) Revisit regional meetings that are more cost accessible to members.	🕐 orange	👤 orange	$ green	👍 yellow
(Communications) Integrate communications with social media tools people already use, with an emphasis on LinkedIn.	🕐 yellow	👤 orange	$ green	👍 orange
(Structure) Realign current units to reflect unit choice (strategic unit, cross-disciplinary unit, or community of interest).	🕐 orange	👤 orange	$ green	👍 orange
(Measurement and Rewards) Units should be rewarded primarily for member engagement and development.	🕐 orange	👤 orange	$ green	👍 orange
(Growth and Development) Offer more Continual Education Units (CEUs).	🕐 orange	👤 orange	$ yellow	👍 orange