Member Engagement Feasibility and Priority Committee
Report to the Executive Board
May 3, 2021

The Member Engagement Feasibility and Priority Committee was established to review the Member Unit Effectiveness and Engagement Project (MUEEP) report prepared by Brighter Strategies, and evaluate and prioritize the recommendations based on feasibility, timing, financial implications, staffing and governance implications. The Committee was comprised of twelve APHA members and six staff members, who served as non-voting advisors providing critical information related to Association processes and procedures and served as the liaison to one of 5 subcommittees.

The Committee met five times beginning on March 19, adopted principles of engagement and agreed upon the goal of developing and presenting a plan that "seeks the 'biggest bang for the buck' in promoting change that will greatly enhance APHA member experience and value." Members were divided into 5 subcommittees that focused on a particular organizational area outlined in the MUEEP report. Each group evaluated the recommendations in their topic area and presented their priorities to the full committee. The organizational areas follow:

- Communications and Information Technology
- Volunteer Leadership
- Measurement and Rewards
- Member Growth and Development
- Member Engagement

Please note, it was decided that recommendations related to member unit structure would-be put-on hold until the Association addresses items in the above-mentioned organizational areas.

As noted above, each subcommittee analyzed and prioritized the recommendations in their organizational area. A representative from each subcommittee presented the final recommendations, (all subcommittee rankings by organizational area are found in Appendix A thru E) and the full committee was asked to select their top ten priorities across all organizational areas. The results of the survey were tabulated and shared with the group. The Committee met on April 30 to discuss and adopt the priorities for presentation to the Executive Board.

The Committee began their work with the understanding they would review the 35 recommendations made by Brighter Strategies. Upon further review by each subcommittee, recommendations were consolidated within organizational areas. After consolidation, the Committee was asked to prioritize 28 recommendations.

The following are the top ten priorities the Member Engagement Feasibility and Priority Committee recommends the Executive Board adopt as the key areas of focus for enhancing APHA member experience and value. It should be noted that the recommendations are listed in the order in which they were ranked by the Committee, and the top three recommendations were unanimous.

- Replace APHA Connect with a more user-friendly tool and create an easily accessible landing page for APHA members. *(Communications and IT)*
- Create a transfer of institutional knowledge process between outgoing and incoming leaders. Create a clear and transparent process to help elected leaders who are unable to deliver to step down, and for a new leader to be elected. Provide current and potential leaders more guidance through a member unit-level leader handbook. Provide more targeted leadership training. *(Volunteer Leadership)*
- Integration of the several data systems which hold a variety of information about members and their engagement. *(Member Engagement)*
- Create a structured process to onboard new members focusing on navigating APHA and getting value out of their membership and ensure the information on each unit, subunit, strategic goals, and activities, and how to get involved is readily available to both current and new members. *(Communications and IT)*
- Develop a comprehensive approach to connecting members with mentors. *(Growth and Development)*
- APHA should diversify "rewards." *(Measurement and Rewards)*
- Educate members about who their leaders are and what they do. Provide more information about potential leaders on election day. Hold more regular opportunities to engage with leaders. *(Volunteer Leadership)*
- Units should be rewarded for promoting the vision and mission of APHA. *(Measurement and Rewards)*
- Offer more speed mentoring programs throughout the year. *(Growth and Development)*
- Have a specific staff position established to direct and guide new members. *(Member Engagement)*

The following are the remaining recommendations the Committee did not rank in the top ten but feels very strongly should be given every consideration and included when mapping the implantation plan. It should be noted that the recommendations are listed in the order in which they were ranked by the Committee.

- Build on APHA's strength with federal advocacy so that APHA can elevate its voice at the national level. *(Growth and Development)*
- Provide leaders with a monthly list of new members to support outreach within the units and announce new members on a monthly or quarterly basis. *(Member Engagement)*
- Hold regular (monthly/quarterly) orientations for new members. *(Member Engagement)*
- Hold more leader-to-leader events. *(Volunteer Leadership)*
- Conduct more interactive meetings. *(Member Engagement)*
- Create and communicate guidance for internal communication and refine communication specialist volunteer positions in each unit. *(Communications and IT)*
- Create more unit liaison roles to help with cross-cutting goals and priorities. *(Communications and IT)*
- Educate members about APHA leaders. *(Volunteer Leadership)*
- Ensure the APHA Annual meeting encourages qualitative research presentations equally. *(Growth and Development)*
- Create a rapid response system. *(Growth and Development)*

- Integrate communications with social media tools people already use, with an emphasis on LinkedIn. *(Communications and IT)*
- Units should be rewarded for community action. *(Measurement and Reward)*
- Units should be rewarded primarily for member engagement and development. *(Measurement and Rewards)*
- Facilitate more peer learning opportunities with experts. *(Growth and Development)*
- Offer more Continuing Education Units (CEUs). *(Growth and Development)*
- Build additional state/local advocacy strength and provide guidance on a coordinated strategy with local advocates. *(Growth and Development)*
- Collect data at the time of registration to understand new members' interests and follow-up with connections to the appropriate APHA member unit/leaders. *(Member Engagement)*
- Conduct regional meetings that are more cost accessible to members. *(Member Engagement)*

Upon Executive Board adoption of the priorities, committee members recommend that APHA staff develop a comprehensive implementation plan based on the availability of funds and staff resources for Executive Board consideration. It should be noted that committee members acknowledge the importance of all the recommendations made by Brighter Strategies but concede that some of the recommendations are not feasible at this time.

In closing, committee members wish to thank Drs. Benjamin and Wathington for allowing us the opportunity to participate in this important project. Committee members are available to assist with the next phase of this activity if requested.

Respectfully submitted,

J. Alan Baker, MA – Co-Chair
Kaye W. Bender, RN, PhD, FAAN – Co-Chair and APHA President-elect

Marc Aaron Guest, PhD, MPH, MSW – Speaker of the Governing Council
Benjamin H. Hernandez, MBA – Treasurer
Jeanie L. Holt, MS, MPH – Executive Board Member
Resa M. Jones, MPH, PhD
Kathy M. Lituri, RDH, MPH
Suparna Navale, PhD, MPH, MS
Rachael N. Reed, DrPH, MPH – Chair, Intersectional Council
David J. Reyes, DNP, MN/MPH, RN, PHNA-BC – Executive Board Member
Dyane E. Tower, DPM, MPH, MS
Catherine L. Troisi, PhD – Executive Board Member

Appendix A

Communications and Information Technology Priority Ranking

Subcommittee: Kaye Bender, Aaron Guest, Benjamin Hernandez, Elsa Greer (staff) and Fran Atkinson (staff)

Recommendation	Discussion	Priority
HI1. Replace APHA Connect with a more user-friendly tool and create an easily accessible landing page for APHA members **Merged HI1 & QW4**	• All agreed that purchasing a new online community was the priority. Many of the other recommendations hinge on accomplishing this one. • Will begin working on RFP and determine what features should be included. • Subcommittee will review websites for Breezio (https://info.breezio.com/home), Higher Logic (http:/www.higerlogic.com), Mobilize (www.mobilize.io) and Sengii (https://sengii.com). Based on our discussions, the subcommittee agreed on time, impact of staff, cost and member support.	1
QW3.5 Create a structured process to onboard new members focusing on navigating APHA and getting value out of their membership and ensure information on each unit, subunit, strategic goals and activities, and how to get involved is readily available to both current and new members. **Merged Q1 &Q3**	• Already in process, might be easier to do them now based on prioritization being parallel to other recommendations • Continue blast email welcome series • Will take staff time to organize regularly scheduled welcome webinars, but can begin within 6 months • Add staff contact information to webpages • **Connects with the Volunteer subcommittee** Based on our discussions, the subcommittee felt the following is a better representation of the time, impact on staff, cost, and member support of this recommendation.	2
QW2.5 Create and communicate guidance for internal communication and refine communication specialist volunteer positions in each unit	• Sections already have Communication Chairs • An online community was created for Communication Chairs to share information • Needs more infrastructure.	3

Merged QW2 & LT2	• In some Sections they do not fill the position because of a lack of volunteers. Many times, the Communication Chair takes on other roles (web editor, online moderator, etc.) which creates burnout. • **Connects with the Volunteer subcommittee** • Needs more staff time Based on our discussions, the subcommittee felt the following is a better representation of the time, impact on staff, cost, and member support of this recommendation.	

LT3. Integrate communications with social media tools people already use, with an emphasis on LinkedIn.	• Look into possibility of online community linking back to social media tools
	• Need to have more discussion on this recommendation
	    o Primary tool for members to network should be APHA online community.
	    o Sections don't update social media tools regularly and lose password information
	    o We have no control what Sections state on the social media tools and can create more work for staff.
	
	Based on our discussions, the subcommittee felt the following is a better representation of the time, impact on staff, cost, and member support of this recommendation.
		4

LT1. Create more unit liaison roles to help with cross-cutting goals and priorities.	• Subcommittee did not agree with this recommendation. It is difficult to find volunteers.
	• Use Forums and ISC Topical Groups to be the vehicle to cut across goals and priorities
	    o The groups have brought Sections together to focus on vital issues
	    o Best to formalize and enhance the process
	• **Should transfer to Member Engagement or Measurements & Rewards.**
		Recommend removing from Comm/IT and moving to Volunteer Leadership

	Based on our discussions, the subcommittee disagreed on time, impact of staff, cost and member support but did not make new recommendation.	

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Appendix B

Measurement and Rewards Subcommittee Priority Ranking

Subcommittee: Resa Jones, Dyane Tower, Cathy Troisi, Yeatoe McIntosh (staff) and Fran Atkinson (staff)

Brighter Strategies provided four possible recommendations that related to Measurement and Rewards. Following a review and discussion of listening session and survey results, as well as the Brighter Strategies report, the Measurement and Rewards sub-committee suggests that two of four recommendations be prioritized: 1) APHA should diversify "rewards" (LT1); and, 2) Units should be rewarded for promoting the vision and mission of APHA (LT3). These two recommendations were selected as they are most feasible given the required resources (e.g., impact on staff, cost), the time necessary to implement, and member support. Also, it should be noted that after deliberation, what Brighter Strategies initially considered as lower cost recommendations may be considerably higher than "green" depending on what rewards/recognitions are implemented and that staff time may be intense.

It is important to note that diversifying "rewards" and rewarding units for promoting APHA's vision and mission are longer-term activities. To be most efficient and fully conceptualize and implement these recommendations, APHA will first benefit from the implementation of higher priority, short-term recommendations, for example, from the Communication and Information Technology and Member Engagement sub-committees. Once in place, it will be easier to create metrics and rubrics to assess unit and member activities. In addition, as APHA re-envisions its strategic plan and possible member unit reorganization, there will be new opportunities to consider what constitutes "rewards," what actions deserve rewards, and the most appropriate measure that constitutes unit and member promotion of APHA's vision and mission.

Recommendation	Discussion	Priority
LT1. APHA should diversify "rewards"		**1**
LT3. Units should be rewarded for promoting the vision and mission of APHA	**Note:** The Sub-committee added "mission", which is more tangible for units and members.	**2**
LT2. Units should be rewarded for community action.		3

LT4. Units should be rewarded primarily for member engagement and development	🕐	👤	$	👍		4

Appendix C

Membership Engagement Priority Ranking

Subcommittee: Jeanie Holt, Kathy Lituri, Suparna Navale, James Carbo (staff) and Nancy Sherwood (staff)

Recommendation	Discussion	Priority
HI1.	Integration of the several data systems which hold a variety of information about members and their engagement– Not on the list, but very important. *Rationale:* Current lack of integration among multiple systems complicates tracking member engagement, wastes staff time in seeking technical solutions to member engagement issues and limits staff ability to customize/personalize the member experience. The hiring of a data specialist could greatly address these issues. The data specialist could handle the following: 1. integrity and functionality of databases, 2. Data integration across all APHA data platforms and 3. buildout/maintenance of new member platforms and technical infrastructure.	1
HI2	(Recommendation #6) Staff person – the focus of the staff person should be decided by APHA staff leadership. The person might focus on member engagement, the APHA database, online community platform, or something else? *Rationale:* Given that many of the recommendations require staff resources which are already stretched too thin this should be the highest priority; however, it should be an internal leadership decision what is included in the additional staff position. Based on our discussions, the subcommittee felt the following is a better representation of the time, impact on staff, cost, and member support of this recommendation. 🕐　👤　$　👍	2
QW1.	(Recommendation #1) Conduct more interactive meetings (research best practices, create toolkits, and provide training. APHA level or Component level or both?) *Rationale:* Members want more opportunities to engage in dialogue, collaborative problem solving, and interactive work across units, both virtually and in-person. This seems relatively easy to start working on and we assume will result in increased member engagement.	3

	Based on our discussions, the subcommittee felt the following is a better representation of the time, impact on staff, cost, and member support of this recommendation. 🕐 👤 $ 👍	
QW2.	(Recommendation #4) Hold regular (monthly/quarterly) orientations for new members (data on who attends); live/interactive orientations as opposed to archived webinars; live takes more resources. *Rationale:* This has already started with an APHA 101 interactive webinar in March so likely a quick win though time and resources needed to continue live-interactive webinar, and data to assess effectiveness must be considered. Additional staff resources would be helpful in implementing this. Based on our discussions, the subcommittee felt the following is a better representation of the time, impact on staff, cost, and member support of this recommendation. 🕐 👤 $ 👍	4
QW3.	(Recommendation #2 [Recommendation #6 in the Brighter Strategies chart has been added to this one]) Provide leaders with a monthly list of new members to support outreach. Within the units, announce new members on a monthly or quarterly basis. The list goes to leaders every 2 months. How can the use of the list be enhanced? *Rationale:* A list is already provided to section leaders. The use of this list (best practices; templates) and how to increase outreach to and engagement of new members is likely a quick win. Additional staff resources to coordinate this work would be helpful. Based on our discussions, the subcommittee felt the following is a better representation of the time, impact on staff, cost, and member support of this recommendation. 🕐 👤 $ 👍	5
LT1.	(Recommendation #3) Collect data at the time of registration to understand new members' interests, and follow-up with connections to the appropriate APHA member unit/leaders. *Rationale:* This recommendation will take more time to implement. Coordination of data systems, deciding what additional data will be helpful and figuring out how to collect that while streamlining the "join" or "renew" processes, and figuring out what to do with the data collected all will require time/resources.	6

	Based on our discussions, the subcommittee felt the following is a better representation of the time, impact on staff, cost, and member support of this recommendation. 🕐 👤 $ 👍	
LT2.	(Recommendation #5) Revisit regional meetings that are more cost accessible to members – Engage with the Council of Affiliates to see what is currently being done, recognizing their questions on their lack of inclusion in the MUEEP. *Rationale:* Regional meetings modeled on the Annual Meeting has been tried in the past and was NOT more cost accessible. In several regions, affiliates already hold regional meetings. Implementing this recommendation will require thinking through what regional meetings would look like, how APHA can partner with affiliates to leverage meetings already being held, and how APHA can support more regions/affiliates to hold regional meetings. Based on our discussions, the subcommittee felt the following is a better representation of the time, impact on staff, cost, and member support of this recommendation. 🕐 👤 $ 👍	7

Appendix D

Member Growth and Development Priority Ranking

Subcommittee: Alan Baker, Dyane Tower, Susan Polan (staff), Regina Davis Moss (staff) and Courtney Taylor (consultant)

Recommendation	Discussion	Priority (ordinal rank)
LT3	Offer more speed mentoring programs throughout the year. • Convert to quick win • Speed mentoring + best practices guide/toolkit for mentoring at the Member Unit level • Utilize existing online mentoring community (changed staff from yellow to green since utilizing existing resources and member expertise)	1
HI3	Develop a comprehensive approach to connecting mentors with members • Integrate into platform to replace APHA Connect (*acknowledge that mentoring cost more, but unsure where to place cost) • More comprehensive guidance on "best practices" for mentoring	2
HI4	Build on APHA's strength with federal advocacy so that APHA can elevate its voice at the national level • Reform Action Board to provide better feedback loop • Expand on actions alerts/legislative updates (*look at possibility of advocacy dashboard w/in online member community; link to member profiles to highlight areas of personal interest on web/emails) • Share best practices on how to get APHA support for advocacy initiatives, legislation, etc. • Expand education on how to use APHA policy tools • Increase staff to address additional issues	3
LT1	Ensure the APHA Annual Meeting encourages qualitative research presentation equally • Convert to quick win • Educate program planners on importance of qualitative research • Create guidelines on the importance of/how to evaluate qualitative research	4

	• Require at least 1 qualitative expert reviewer per Member Unit (*possible link to Measures and Rewards) 🕐 👤 💲 👍	
LT2	Facilitate more peer learning opportunities with experts • Requires further exploration of the types of opportunities members want (topics and format? Webinar? Forum?) • Time dependent on desired format/topic • Member to member; member to outside expert/partner? 🕐 👤 💲 👍	5
LT4	Offer more Continuing Education Units (CEUs) • Possibility for partnership/expansion with Youtube • Icons may change dependent on delivery/frequency 🕐 👤 💲 👍	6
HI1	Create a rapid response program • Need further information on what information people are seeking and how best to deliver it • How best to utilize member expertise w/o creating bottleneck on response to emerging issues • Connect to increasing federal advocacy (HI4) and state/local advocacy (HI2) 🕐 👤 💲 👍	7
HI2	Build additional state/local advocacy strength and provide guidance on coordinated strategy with local advocates • No current APHA capacity to do so (Changed time and money to orange to reflect this) • Would require additional staff • Recommend starting with factsheets on local level/ sample testimony for state level advocacy 🕐 👤 💲 👍	8 (if at all)

Volunteer Leadership Priority Ranking

Subcommittee: Rachael Reed, Kathy Lituri, David Reyes, Susan Polan (staff), Fran Atkinson (staff) and Elsa Greer (staff)

Rank	Policy	Scoring
1.	**Create an APHA-wide handbook/resource framework with relevant chapters to address the following issues to encourage and educate leaders and potential leaders and to inform component activities. Must include standardized language and templates that are then incorporated into section handbooks and are consistent for all components and members. So some pieces mandated by ISC with input and feedback from sections and others allow flexibility. Some of the mandated pieces might be coming from other work groups (e.g. measurement and reward committee looking at defining best practices and how to reward to evaluate engagement). This will benefit everyone. Help components be more professional and save time.** **Q1. Create a transfer of institutional knowledge process between outgoing and incoming leaders.** In most units, several elected positions rotate every 1-2 years and documents frequently get lost in the transition. As such, unit level documents should be stored in an easily accessible location owned by the unit and APHA, not the individual leader. This expectation should be included in the leader handbook. *** 🕐 👤 $ 👍 **Q5. Provide current and potential leaders more guidance through a member unit level leader handbook.** The handbook should cover core topics and policies as well as clear expectations for leadership roles, responsibilities, and time-commitment. This will allow potential leaders to understand what is expected of them, answer leaders' questions, and give members a more consistent experience across units. While serving as a guide, the handbook shouldn't be overly prescriptive but instead allow some unit-to-unit flexibility. We recommend APHA develop this handbook in coordination with unit leaders. *** **LT1. Provide more targeted leadership training.** This could occur through an APHA leadership certificate program and should facilitate a focus on diversity (which includes researcher and non-researchers and the various topics and interests the unit represents, in addition to racial/gender level diversity) in unit leadership. Leaders specifically asked for guidance in student recruitment, identifying scholarships, best practices in using the online communications system, and outreach to new members. *** 🕐 👤 $ 👍	🕐 👤 $ 👍

	Q.3 Create a clear and transparent process to help elected leaders who are unable to deliver to step down, and for a new leader to be elected. This may include appointing an interim leader or holding a quick election. This process should be clearly communicated in leadership governance materials. **Additional recommendation - Educate members about what leaders do. Should also include how to inform members about who their component leaders are.** This can be another chapter in the handbook	
2.	**These recommendations are focused on leader to member education to create opportunities for education and learning among component members. These activities involve translating what already exists into something that makes sense to members who are not as actively engaged. As these activities are organized, need to assure there is consistency between bylaws and component.** **Q2. Educate members about who their leaders are.** This knowledge is the first step to understanding the work of a unit and engaging members. The information needs to be easily available (e.g., on the unit webpage or equivalent in the replacement for APHA Connect) and regularly updated in a consistent way across units. Component leader to component members 🕐 👤 💲 👍 **Q4. Provide more information about potential leaders on election day.** Although we heard that candidate biographies are provided with ballots, many members suggested this as a best practice which leads one to believe they are not easily accessible. We recommend reviewing the election system to make sure the information is consistently available, in more than one way, and in more than one time point (e.g., on the ballot, the latest unit newsletter, on the website). 🕐 👤 💲 👍 **LT3. Hold more regular opportunities to engage with leaders.** Members specifically suggested monthly or quarterly calls open to all unit members where people can dial-in and meet leadership outside of the annual meeting. We encourage including tips and techniques on how to facilitate this practice in the leadership training and handbook above. 🕐 👤 💲 👍	🕐 👤 💲 👍
3.	**LT2. Hold more leader-to-leader events.** Leaders requested more regular meetings between leaders and with the Inter-Sectional Council (ISC) to share best practices, including how other leaders manage sections. These meetings in addition to helping leaders succeed, would also better support cross-unit collaboration. Leaders would also benefit from less formal collaboration opportunities using virtual platforms between annual meetings.	🕐 👤 💲 👍

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4.	**This was pulled out from Q2** **Educate members about APHA leaders** **Component leaders engage in process primarily through ISC and staff**	🕐 👤 $ 👍