

# APHEO Executive Survey 2011

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## APHEO Strategic Goal #1

**“Increase the capacity of APHEO to advance and promote epidemiology in the public health system”**

One of the actions identified by the work group responsible for working on this strategic goal was to conduct a survey of recent APHEO Executive Members in order to gain some insights into the types of tasks that they were involved in; workload issues; barriers and enablers; and recommendations for future Executive Committees. This survey was conducted on-line (Fluid Survey) in March and April of 2011. Twenty-one executives who served between 2005 and 2010 were asked to participate. Sixteen executives responded to this survey (76%) representing all executive positions. The following is a summary of some of the findings.

### Executive engagement in APHEO

- Overall, the range of activities performed by executives was aligned with their individual roles. The president, by virtue of the position, is the key contact person and oversees the total business of the association.
- On average, executives indicated spending 10 hours a month on APHEO activities. The range was 4 to 20 hours, the higher number being reflective of the president's post.
- All members had to get formal approval from their superiors (at their PHU) to take on an executive role.
- 67% of the respondents indicated conducting APHEO-related work activities during the PHU work-time.
- 95% of the respondents indicated storing their APHEO files on their work computers/networks. This will be addressed via the ‘*Records Management*’ policy and procedures. In some cases files were stored at work and home.
- 67% of the respondents indicated storing APHEO-related resources/equipment (e.g. posters, laptops, LCD, mementos) at work. This is now tracked using the *APHEO Inventory List* which needs to be updated at regular intervals.
- All respondents indicated receiving in-kind support from their PHU. The major in-kind supports included: time to do APHEO business; coverage of expenses related to attending APHEO meetings; using office email, photocopiers and phones as well as office supplies. Some members were also able to use PHU equipment (e.g. laptops or LCDs) for APHEO business meetings. In some cases, PHU clerical and communications staff assisted with various items as well. All members estimated the dollar amount of in-kind support (time at work excluded) to be at about \$500, which would translate into about \$3,500 per Executive per year (time to do APHEO business on PHU time excluded).
- While executives recognized the efforts of their peer executives and extended appreciation, this was less likely from APHEO members themselves and even less likely from their employers and PHU colleagues. We currently take the time to thank outgoing

members of the executive at either the last meeting of the year or the first meeting of the new year. However, the latter finding speaks to the need for a more standard and consistent way of marketing of APHEO and informing the employers about the contribution and/or accomplishments of their staff.

- Over 50% of executive members’ time is spent writing policy and procedures, preparing documents and resources, identifying activities requiring action and preparing executive updates.
- Over 50% of time is spent monitoring/being aware of what is happening in the field of public health epidemiology, attending external meetings on behalf of APHEO, participating on work groups/committees, coordinating/networking/linking of members and external stakeholders

### How can APHEO improve its strategies for recruitment of Executive Members?

The following is a list of responses grouped by themes and the corresponding comments and recommendations.

Theme	Comment
Clearly define the roles and expectations of the various positions	This is now done via the <i>Executive Position Descriptions</i> . Any further outline of expectations may be misleading or limiting as the Executive functions as a cohesive and responsive body with members taking on various tasks on as-needed basis. See comment under ‘Mentoring’.
Clearly outline the benefits of participation on APHEO Executive to employers	<b>Recommendation:</b> 1. Produce a Q&A style list of benefits to individual members, their employers, the public health community and province overall. Post this on the website (e.g., in the ‘Membership’ icon). This can be used as a resource, by members, when discussing the benefits of their membership and involvement in APHEO with their management.
Clearly define what decisions can be made by the Executive without member consultation	This will help to expedite association business while giving the Executive the confidence to proceed in the chosen manner. This will require an agreement and understanding with members and documentation of types of decisions where the Executive has discretionary power. <b>Recommendations:</b> 1. Consider allowing members to put forward a motion, on issues relevant to members and for consideration and vote by APHEO, at any time during the year. This will allow members to raise new issues for consideration by the association. 2. List/define types of decisions for Executive sole discretion. 3. Consider voting on important issues to be conducted during one general meeting (i.e. the meeting that is held during a workshop or conference).

Mentoring	<p>There may be members (both, new and longer-standing) who are considering joining the executive but feel that they lack the knowledge, skills etc.</p> <p><b>Recommendation:</b></p> <ol style="list-style-type: none"> <li>1. Identify members who wish to gain insights into the workings of the executive and arrange for these individuals to participate at designated executive meetings. Assign tasks as appropriate.</li> </ol>
Re-visit the structure of the Executive	<p>Given the discussions about workload and potential external (hired or voluntary) supports, and the fact that half of the respondents have been with APHEO for less than 5 years, the comments about new members not feeling well connected to the association, suggests that it may be worthwhile to add 1-2 new positions with some higher-level defined roles and responsibilities. This, in addition to allowing for a higher level of involvement and integration with the association, may itself serve as a ‘mentorship setting’ for members who are considering eventually becoming a vice-president or president.</p> <p><b>Recommendations:</b></p> <ol style="list-style-type: none"> <li>1. Consider the addition of a Member with less than 5 years of standing – to primarily serve as liaison to new members and students. Also, to assist with activities as they arise.</li> <li>2. Consider the addition of a Member with more than 5 years of standing – to serve as a liaison (e.g. liaison to all the special projects, work groups, committees with APHEO reps) and assist with activities as they arise.</li> </ol>
Consider affiliate members for certain roles	<p>Currently, according to the APHEO constitution, only full members may hold an executive position. Given that more than 50% of members are affiliates and the fact that a large proportion of these affiliates do work in public health epidemiology (though not in health units) or hold epidemiology-related roles in health units – it may be time to re-consider membership status or to expand on roles for affiliates. This would certainly help with executive recruitment, greater cohesion amongst members and more engagement in the association.</p> <p><b>Recommendation:</b></p> <ol style="list-style-type: none"> <li>1. Engage members in review of the constitution, membership status and roles for full and affiliate members.</li> </ol>
Consider rotational volunteer positions to allow exposure and on-the-job training for prospective members	<p>This could certainly help with the workload as well as mentoring. Need to be cautious about ultimate accountability. See comments under ‘Mentoring’.</p>
Stipends and/or other forms of and appreciation	<p>Currently, outgoing members of the executive receive an acknowledgment and thank-you at either the final meeting of the year or the first meeting of the new year. As of the last few years, the President receives a plaque and the other members receive a small gift</p>

	<p>certificate (these are not time-of-service adjusted). The process for Executive recognition needs to be standardized and documented for reference/guidance for future Executive Committees. Stipends, while favourable at face-value, may present a host of issues. The following would need to be considered: the amount itself, would the amount be commensurate with the role responsibility, potential dissatisfaction of fellow executive's with colleagues performance, APHEO's financial standing (which is largely dependent on external project contracts) to name the most obvious.</p> <p><b>Recommendation:</b></p> <ol style="list-style-type: none"> <li>1. Formally document the process and method for recognition and appreciation of each executive member. This will form standard practice for subsequent Executive Committees to follow.</li> <li>2. Continue to acknowledge outgoing Executive Members in a standard manner.</li> <li>3. Ensure that the outgoing Executive Member and their employer receive a letter of acknowledgment and thank-you.</li> </ol>
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### How can APHEO improve its strategies for retention of Executive Members?

For the most part, APHEO has had pretty good retention of executive members. Namely, members have moved into other positions and have stayed in their roles when recruitment of new members was not successful.

However, it is important to learn 'why executives choose to leave after one year of service' and 'what would help to support them in their position'.

We have heard that some kind of support to their role may be helpful and effective – one of the recommendations would be to include two additional roles (see previous section) and allow volunteers to rotate through the executive with the aim of being mentored while also providing a useful service. This would be preferable to rotating through positions.

The need for recognition and appreciation was also highlighted.

#### **Recommendations:**

1. Conduct an in-coming interview with new executive members to learn what their concerns and perceived barriers may be. Use this information to ensure that all executive members are sufficiently supported in their role and that the key issues are addressed.
2. Conduct an out-going interview with outgoing executive members to learn from their experience: what barriers did they encounter; what additional supports or resources could they have used; their lessons learned and recommendations to future members, among other questions.

**In your opinion, who do you think should/could complete the following tasks – meeting logistics, daily operations, and special events?**

The goal of this question was to learn whether executives felt that they could in fact relinquish some of their responsibilities and which activities these would be. Executives could fairly consistently identify individual tasks that could be handled by a non-Executive member. This would either be a hired staff person (if APHEO moved into a secretariat or Executive Director model) or an APHEO member who would volunteer to manage these tasks for a designated period of time. Having an APHEO member do this would itself achieve the goal of ‘mentorship’ as this person would be privy to the business and activities of the executive. Such a process could have the potential of improving recruitment – as well as retention (decreased workload) – of the executive.

**Recommendation:**

1. Re-visit the structure of the executive with the goal of adding 1-2 new positions (see comments under this heading in the table above) with defined scope of activities.

**Thinking about all the positions you held in the past 5 years, which activities or tasks were the largest sources of burden (i.e., problem, worry) for you?**

Respondents reported that the following activities were a problem and often timelines were tight:

- objectively representing APHEO while lacking sufficient time for member consultation
- creating, editing and obtaining approval for Policies and Procedures (Note: this has been partly resolved by the passing of a new policy ‘*Issuing New Policies and Procedures*’ in May 2011)
- planning of workshops and conferences; and, education sessions
- responses to position papers
- strategic planning, and its implementation
- managing external project contracts and finances related to these
- managing memberships and the associated financial responsibilities
- attending constituent society work group meetings
- managing membership registration (before it became automated). This stresses the importance and value of members paying their fees online and moving to this system 100% (members need to understand the importance of this)

**In your opinion, were there activities that were not addressed by the Executive or addressed incompletely because of lack of human or financial resources? If so, what were these activities?**

63% of the respondents indicated this to be true. The most frequently listed activities included: position paper; follow-up on public health issues of interest to APHEO and its members; liaising with chairs of workgroups, special projects and planning committees. Less frequently stated were the following: collaboration with constituent societies (CS) on their work groups and attendance of meetings of CS meetings. However, it needs to be considered that only executive members who were representatives on CS viewed this as important and responded to this question. There are a lot of opportunities of working with CS on public health issues which are not explored due to lack of human resources. Strategic planning is another area that was cited. This, after all, is an ongoing process that requires dedicated attention – something that has been difficult to achieve.

**In your opinion, to be an effective Executive Member, do you think that you have/had sufficient resources?**

Respondents indicated that there is a need for clear description of role, responsibilities and authority of the Executive Committee. A suggestion was made to include a policy analyst-type role to assist with advocacy and position papers. Some respondents indicated that they took on positions without any prior knowledge and that an orientation tool would be helpful.

**One Comment:** “We managed well with the mix of interests, skills and experiences. But that is not to say that we were experts in all areas or could not have benefited from extra support”.

**In your opinion, do you think that ad hoc committees (e.g. writing advocacy position papers, representatives on provincial work groups and initiatives, proposal writing, etc.) are essential to carry on APHEO business?**

88% indicated this to be essential. This again raises questions about capacity to do this effectively.

## **In your opinion, do you think that it is necessary for the executive to stay connected to the various projects?**

Again, 88% indicated this to be necessary. The implementation of a structured project manager or chair recruitment process and the requirement for updates to the Executive helped to facilitate this connectedness. However, this was more of a passive connection than active one due to limited human resources, timelines and other competing priorities. This continues to highlight the importance of the *'Project Manager Roles and Responsibilities'* and *'Recruitment, Roles and Responsibilities of Working Group Members'* procedures as well as the requirement for a more frequent and structured updates for the Executive Committee.

### **Recommendation:**

1. Develop a structured Project Update/Work Group to be used by the project manager/work group chair for updates for the Executive Committee (e.g., use the Work Group Update template used for APHEO General Meeting as a guide)

## **What recommendations would you make to APHEO to build capacity within the organization?**

Respondents reported that there is a need for 'administrative support'. This support would relieve members to engage in responding to position papers; carry out strategic planning and mentor members. Executive members would have time freed up for work in advocacy and consultation with external stakeholders. This 'administrative support' – traditionally thought of within the 'secretariat' or 'executive director' framework – can be simply addressed by the addition of 1-2 new positions with defined roles (see comments in the table on page 2 under 'revisit the structure').

### **Recommendations:**

1. Re-visit the structure of the Executive Committee to add 1-2 new positions to off-set the workload
2. Empower more members to take on leadership roles in various areas and help to connect all the pieces of APHEO business (e.g., policy analysis and papers; liaison to all work groups, special projects, committees; liaison to CS work groups; liaison to other external partners)
3. Continue to secure finances to help with contracting of services to cover areas where we lack expertise or human resources to get the job done.
4. Highlight the importance of APHEO and APHEO business and its relevance to public health (units) and the province.

## **What recommendations would you make to APHEO to engage new members in the APHEO Executive?**

The following suggestions were made:

- promote the benefits of being a member of the Executive Committee to each member and their employer
- provide the Executive Committee with administrative support to lessen the workload
- provide mentoring using various strategies and role descriptions that will help with recruitment and retention

### **Recommendations:**

1. Re-visit the structure of the Executive Committee to add 1-2 new positions to off-set the workload
2. Implement a mentorship/internship program: seek out members who would like to gain insights into the workings of the executive and arrange for these individuals to participate at designated executive meetings and assign tasks as appropriate.
3. Implement a formal recognition and appreciation event.
4. Highlight the importance of APHEO and APHEO business and its relevance to public health (units) and the province.
5. Encourage APHEO members in managerial positions to participate on the Executive.

## **What recommendations would you make to APHEO to continue to support those members already active on the APHEO Executive?**

Feedback provided by respondents is reflective of the comments presented in the sections above. Asking the current executive what they need or would like would be very insightful.

### **Recommendations:**

1. Conduct a survey/interview at the end of the first quarter to see how executives would like to be supported and what ideas they can offer.
2. Use the findings of an 'Exit Interview' from last year's Executive to implement recommendations.
3. Empower more members to take on leadership roles in various areas and help to connect all the pieces of APHEO business (e.g., policy analysis and papers; liaison to all work groups, special projects, committees; liaison to CS work groups; liaison to other external partners)
4. Continue to secure finances to help with contracting of services to cover areas where we lack expertise or human resources to get the job done. Contract out pieces of work that can be done by someone other than an executive member.
5. Re-visit the structure of the Executive Committee – consider addition of an affiliate with a defined role to off-set workload and bring in a different skill set.

## **Appendix A: List of Recommendations.**

### **Work with Health Units:**

1. Produce a Q&A style list of benefits to individual members, their employers, the public health community and province overall. Post this on the website (e.g., in the 'Membership' site). This can be used as a resource, by members, when discussing the benefits of their membership and involvement in APHEO with their management.
2. Highlight the importance of APHEO and APHEO business and its relevance to public health (units) and the province.

### **Executive Committee:**

3. List/define types of decisions for Executive sole discretion.
4. Re-visit the structure of the executive with the goal of adding 1-2 new positions (see comments under this heading in the table above) with defined scope of activities.
  - a. Consider the addition of a Member with less than 5 years of standing – to primarily serve as liaison to new members and students. Also, to assist with activities as they arise.
  - b. Consider the addition of a Member with more than 5 years of standing – to primarily serve as a liaison (e.g. liaison to all the special projects, work groups, committees with APHEO reps). Also to assist with activities as they arise.
  - c. Consider addition of an affiliate with a defined role to off-set workload and bring in a different skill set.
5. Implement a mentorship/internship program: seek out members who would like to gain insights into the workings of the executive and arrange for these individuals to participate at designated executive meetings and assign tasks as appropriate.
6. Formally document the process and method for recognition and appreciation of each executive member. This will form standard practice for subsequent Executive Committees to follow.
  - a. Continue to acknowledge outgoing Executive Members in a standard manner.
  - b. Ensure that the outgoing Executive Member and their employer receive a letter of acknowledgment and thank-you.
  - c. Implement a formal recognition and appreciation event.
7. Conduct an in-coming interview with new executive members to learn what their concerns and perceived barriers may be. Use this information to ensure that all executive members are sufficiently supported in their role and that the key issues are addressed.
8. Conduct a survey/interview at the end of the first quarter to see how executives would like to be supported and what ideas they can offer.
9. Conduct an out-going interview with outgoing executive members to learn from their experience: what barriers did they encounter; what additional supports or resources could they have used; their lessons learned and recommendations to future members, among other questions. Use the findings of an 'Exit Interview' from last year's Executive to implement recommendations.

10. Continue to secure finances to help with contracting of services to cover areas where we lack expertise or human resources to get the job done. Contract out pieces of work that can be done by someone other than an executive member.

**Work with APHEO Members:**

11. Consider allowing members to put forward a motion, on issues relevant to members and for consideration and vote by APHEO, at any time during the year.
12. Consider voting on important issues to be conducted during one general meeting (i.e. the meeting that is held during a workshop or conference).
13. Seek out members who would like to gain insights into the workings of the executive and arrange for these individuals to participate at designated executive meetings. Assign tasks as appropriate.
14. Engage members in review of the constitution, membership status and roles for full and affiliate members (i.e. during the next round of Strategic Planning)
15. Develop a structured Project Update/Work Group to be used by the project manager/work group chair for updates for the Executive Committee (e.g., use the Work Group Update template used for APHEO General Meeting as a guide)
16. Empower more members to take on leadership roles in various areas and help to connect all the pieces of APHEO business (e.g., policy analysis and papers; liaison to all work groups, special projects, committees; liaison to CS work groups; liaison to other external partners)
17. Encourage APHEO members in managerial positions to participate on the Executive.