

**2020-2021 Principles of Affiliation Assessment Questions**

**Collecting 2019-2020 Data**

**GOVERNING DOCUMENTS**

<b>Bylaws:</b>
What year were the affiliate bylaws last reviewed by Affiliate BOD?
<b>Strategic Plan:</b>
Does the affiliate have a strategic plan?
If yes, what was the last date it was updated?
<b>Registered Agent:</b>
List the name of the affiliate's registered agent. (a registered agent is an individual or entity who is authorized to receive official correspondence, formal notifications, and services of process on behalf of the affiliate. A registered agent must take steps as required by state law to register with the state.)
<b>Budget:</b>
Did the affiliate approve a Program of Work/Budget prior to the start of the fiscal year?

**FINANCIAL OUTCOMES**

<b>Actual Expenses totaled: \$</b>
<b>Budgeted Expenses: \$</b>
<b>Actual Revenue Totaled: \$</b>
<b>Budgeted Revenue: \$</b>
<b>End of year deficit or surplus of: \$</b>
<b>Amount in savings/investment accounts: \$</b>
<b>Provide the dollar amount spent on lobbying expenses during the fiscal year. \$</b>
<b>How often does the affiliate prepare financial statements: (select one)</b>
ANSWER: select one A. Monthly B. Quarterly C. Bi-annually or less D. Never

**LEADERSHIP**

<b>Which statement best describes the current leadership succession plan? (select one) *A leadership succession plan is when a board creates and implements a plan to identify successors on an ongoing basis.</b>
ANSWER: select one: Written and implemented/Written, limited implementation/No succession plan in place
<b>Which statement best describes board orientation? (select one)</b>
ANSWER: select one: A. Thorough training including explanation of board/individual responsibilities and orientation to the affiliate

- B. Limited, includes brief meeting with transition of documents
- C. No formal orientation

**ADMINISTRATIVE STRUCTURE**

<b>Does the affiliate have a written conflict of interest policy? Yes/No</b>
<b>Does the affiliate have a written whistleblower policy? Yes/No</b>
<b>Does the affiliate have a written document retention and destruction policy? Yes/No</b>
<b>Does the affiliate have an authorized signer policy? Yes/No</b>
<b>Does the affiliate have a financial control policy? Yes/No</b>
<b>Does the affiliate have a sponsorship policy? Yes/No</b>
<b>Does the affiliate have a sponsorship prospectus? Yes/No</b>
<b>Does the affiliate have a budget policy? Yes/No</b>
<b>Which statement best defines the affiliate operations: (select one)</b>
ANSWER: select one: <ul style="list-style-type: none"> <li>A. Written and implemented policies and procedures for all operational programs and services are in place</li> <li>B. Written and implemented policies and procedures for some operational programs but not all are in place.</li> <li>C. The affiliate has written policies and procedures but does not currently follow.</li> <li>D. No written policies and procedures are in place.</li> </ul>
<b>Which statement best defines how the affiliate manages member recruitment (select one):</b>
ANSWER: <ul style="list-style-type: none"> <li>A. The affiliate plans and executes an annual membership recruitment campaign.</li> <li>B. Affiliate occasionally engages in membership recruitment.</li> <li>C. There are no established methods in place for membership recruitment.</li> </ul>
<b>CHANGE Does the affiliate sign an annual contract with an executive director/administrator?</b>
<ul style="list-style-type: none"> <li>A. Yes – a contract is signed every year or on a multi year cycle</li> <li>B. No – terms are verbally agreed upon or terms are extended from a previous contract</li> <li>C. The affiliate employees an executive director/administrator – no contract is signed.</li> <li>D. The affiliate does not work with an executive director/administrator.</li> </ul>
<b>Does the affiliate sign an annual contract with any of the following types of contractors? (select all that apply)</b>
<ul style="list-style-type: none"> <li>• Website Coordinator</li> <li>• Newsletter Designer/Publisher</li> <li>• Accountant</li> <li>• Legal Representative</li> <li>• Lobbyist</li> <li>• Other:</li> <li>• Specify Other:</li> </ul>
<b>Does the affiliate have a separate charitable foundation?</b>
<b>Does the affiliate purchase additional insurance above what is provided for by the Academy? Please indicate other contracts/insurance your affiliate has.</b> Answer: select one; Yes/No

- If yes, what type?

**DISTRICT MEMBERSHIP**

**Please specify your affiliate’s structure**

- A. Affiliate has districts
- B. Affiliate has regions
- C. Affiliate as a mixture of districts and regions
- D. Affiliate does not have districts or regions

**Specify the process the affiliate uses to ensure that all district members are Academy members.**

ANSWER:

- A. District members join through an online process that includes Academy membership verification.
- B. The affiliate requires that the district submit a list of member names to the affiliate for verification.
- C. The affiliate does not monitor that district members are Academy members.
- D. District leaders have access to a list of affiliate members and verify Academy membership on their own.
- E. N/A – the affiliate has no districts.
- F. Other

**PUBLIC POLICY**

**How large is the budget for public policy activities (both federal and state)?**

- A. <\$499
- B. \$500-999
- C. \$1,000-2,000
- D. \$2,000-5,000
- E. More than \$5000
- F. N/A

**Do you have money reserved for future/unexpected public policy needs?**

**Indicate the categories that contributed to public policy expenses.**

- Travel expenses for volunteers and lobbyist
- Lobbyist fees
- Expenses associated with hosting an educational event (ie. hill day)
- Promotional/marketing material expense
- The affiliate had no public policy expenses

**What is the legislative focus of the affiliate’s paid lobbyist?**

- A. To enact/implement new or stronger licensure/certification-related legislation
- B. To protect current licensure/certification legislation
- C. To advance specific non-licensure elements of the Public Policy Plan of Work
- D. We do not have a paid lobbyist
- E. Others, please list

**How much money is budgeted for the state Political Action Committee?**

- A. \$0
- B. <\$1,000

<ul style="list-style-type: none"> <li>C. \$1,000-\$5,000</li> <li>D. \$5,000-\$10,000</li> <li>E. \$10,000+</li> <li>F. The affiliate does not have a Political Action Committee</li> </ul>
Does the affiliate review or approve the annual Public Policy Plan of Work document the Public Policy Coordinator submits?
<b>What are the affiliate's non-legislative public policy priorities?</b>
<ul style="list-style-type: none"> <li>A. To initiate regulatory advocacy efforts toward authorizing RDNs to issue therapeutic diet orders in hospitals</li> <li>B. To initiate regulatory advocacy efforts toward clarifying Medicaid coverage and reimbursement for nutrition services outside of pandemic-related circumstances</li> <li>C. To ensure licensing/certification board is operating properly and/or agency is processing applications properly</li> <li>D. To conduct training on the recently released Incident Reporting Tool</li> <li>E. To amend/clarify existing regulations on licensure or other (please specify)</li> </ul>
Others, please list

**MEMBER SERVICES**

<b>Has the affiliate conducted a member satisfaction survey within the past 3 years?</b>
<b>What do members report is the affiliate's primary benefit? (select one)</b>
<ul style="list-style-type: none"> <li>A. CPEU opportunities</li> <li>B. In-person Events</li> <li>C. Newsletter</li> <li>D. Public policy/legislative efforts</li> <li>E. Web site</li> <li>F. Job board</li> <li>G. Marketing the RDN as nutrition expert/media relations</li> <li>H. Other (explain)</li> </ul>
– other text box
<b>Does the affiliate allow individuals to join as subscriber members? (These are individuals who are not eligible for Academy membership.)</b>
<b>Does the affiliate allow individual to join as supporter members? (These are individuals who are already members of another affiliate, but join an affiliate as a secondary member.)</b>
<b>Does the affiliate manage any dietetic practice groups? If yes, please list the names.</b>
<b>Please outline any goals, alliances, projects, or resources linked to advancing roles of leadership in public health nutrition your affiliate has executed.</b>