

POLICY AND PROCEDURES MANUAL



GEORGIA PUBLIC HEALTH ASSOCIATION
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The Georgia Public Health Association Policies and Procedures Manual is approved by the GPHA Membership on:

Date: May 9, 2019


GPHA President: 

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SECTION I.
INTRODUCTION AND GENERAL INFORMATION

INTRODUCTION AND GENERAL INFORMATION

PURPOSE

This Procedure Manual is designed to assist those with elected, appointed, or staff responsibility for the operation of the Georgia Public Health Association (hereafter called "GPHA"). As a working document, it outlines the methods by which the present activities of the Association are performed and the relationships between various parts of the Association. Basic information pertaining to duties and responsibilities may be changed by the Board of Directors, or by amending the Bylaws if applicable, as experience and circumstances dictate.

DISTRIBUTION

Each person elected or appointed to a responsible position, i.e., Executive Board Members shall receive a copy of this document through the Executive Services Provider. Standing and Special Committee Chairs shall receive a copy of the portion which describes the roles and responsibilities of all Committees.

The Executive Services Provider will prepare any changes in the By-Laws and the Policies and Procedures Manual that are adopted and distribute these changes at the next Board meeting.

Each manual holder shall keep the manual updated and in order.

The manual shall be posted on the GPHA website members only section and updated by the Executive Services Provider.

OFFICIAL RECORDS

The official records of this Association are maintained by the Executive Services Provider. Current files and records should be submitted at the end of each year to be consolidated by the Executive Services Provider.

An annual evaluation shall be made by the Executive Services Provider and the outgoing President.

EXECUTIVE OFFICES

Georgia Public Health Association
327 South 9th Street, Suite 1
Griffin, GA 30224
TEL: 404-861-8423
FAX: 706-484-2764

SECTION II.
POLICIES AND PROCEDURES



**GEORGIA PUBLIC HEALTH ASSOCIATION, INC.
POLICY # GEN-04701
CONFLICT OF INTEREST POLICY & PROCEDURES**

1.0 PURPOSE

This policy is for the purpose of:

- 1.1 The purpose of this conflict-of-interest policy is to prevent the institutional or personal interests of Georgia Public Health Association (GPHA) Executive Board members, all Section officers, Committee Chairs and contractors from interfering with the performance of their duties to GPHA, and to ensure that there is no personal, professional, or political gain at the expense of GPHA.
- 1.2 This policy is not designed to eliminate relationships and activities that may create a duality of interest, but to require the disclosure of any conflicts of interest and the recusal of any interested party in a decision relating thereto.

2.0 AUTHORITY

The Georgia Public Health Association, Inc. (GPHA) Conflict of Interest Policy and Procedures is published under the authority of GPHA and in compliance with the following:

- 2.1 Bylaws of the Georgia Public Health Association, Inc.
 - 2.1.1 501(c)(3) of the Internal Revenue Code
 - 2.1.2 GPHA Executive Board

3.0 DEFINITIONS

- 3.1 GPHA – Georgia Public Health Association, Inc.
- 3.2 The Association – GPHA
- 3.3 Finance Committee – Standing committee of the Association

4.0 SCOPE

This policy applies to all Executive Board members, Section officers, Committee Chairs, and contractors of the Georgia Public Health Association, Inc.

5.0 POLICY

- 5.1 A conflict of interest may exist when the interests or potential interests of any Executive Board member, or that person's close relative, or any individual, group, or organization to which the person associated with GPHA has allegiance, may be seen as competing with the interests of GPHA, or may impair such person's independence or loyalty to GPHA.
- 5.2 A conflict of interest is defined as an interest that might affect, or might reasonably appear to affect, the judgment or conduct of any Executive Board member, Section officers, Committee Chairs, and contractors in a manner that is adverse to the interests of GPHA.

5.3 **Use of Information:** Executive Board members, officers, and staff shall not use information received from participation in GPHA affairs, whether expressly identified or stated as confidential or not, for personal gain or to the detriment of GPHA.

5.4 **Disclosure and Recusal:**

5.4.1 Whenever any Executive Board member has a conflict of interest or a perceived conflict of interest with GPHA, he or she shall notify the board chair of such conflict in writing.

5.4.2 Whenever any member or contractor (paid or volunteer) has a conflict of interest or a perceived conflict of interest with GPHA, he or she shall notify the President of such conflict in writing.

5.4.3 When any conflict of interest is relevant to a matter that comes under consideration or requires action by the board, or a board committee, the interested person shall call it to the attention of the board chair and shall not be present during board or committee discussion or decision on the matter.

5.4.4 That person shall provide the board or applicable committee with any and all relevant information on the particular matter.

5.4.5 The minutes of the meeting of the board or its committee shall reflect that the conflict of interest was disclosed, that the interested person was not present during discussion or decision on the matter, and did not vote.

6.0 RESPONSIBILITIES

6.1 The Executive Board shall ensure compliance with this policy.

6.2 All officers and members of the Association are responsible to adhere to this policy.

7.0 PROCEDURES

7.1 A copy of this conflict-of-interest policy shall be furnished to each Executive Board member, Section officer, and contract provider who is currently serving this organization or who may become associated with it.

7.2 This policy and its application shall be reviewed annually for the information and guidance of Executive Board members, officers, and members, each of whom has a continuing responsibility to scrutinize their transactions and outside business interests and relationships for potential conflicts of interest, and make such disclosures as described in this policy.

7.3 Each Executive Board member will be asked to complete a certification of agreement with the policy and disclosure of any known conflicts of interest upon his or her election or re-election to the board and annually thereafter.

8.0 REVISION HISTORY

REVISION #	REVISION DATE	REVISION COMMENTS
0	1/23/2013	Initial Issue
1	7/1/2015	Update
2	4/4/2019	New Template & Updates

9.0 RELATED FORMS & DOCUMENTS

Form #GEN-04701A – GPHA Annual Reviews & Acknowledgements Form



**Form #GEN-04701A
GPHA Annual Reviews & Acknowledgements Form**

Acknowledgment of Receipt

As a member of the Executive Board, a Committee Chair or contacted provider, I acknowledge that I have (check all that apply)

<input type="checkbox"/>	received and read a copy of the <i>Code of Conduct</i>
<input type="checkbox"/>	received and read a copy of the <i>Conflict of Interest</i>
<input type="checkbox"/>	received and read a copy of the <i>Whistle Blower Policy</i>
<input type="checkbox"/>	received and read a copy of the <i>GPHA Bylaws</i>
<input type="checkbox"/>	received and will reference <i>GPHA Policy & Procedure Manual</i>

And, I further recognize that I am responsible for compliance by my signature.

Signature

Name (Please print)

Date

GPHA Position

[] By checking this box, I am providing my electronic signature.



GEORGIA PUBLIC HEALTH ASSOCIATION, INC. POLICY # GEN-04702 CODE OF CONDUCT POLICY & PROCEDURES

1.0 PURPOSE

The purpose of this policy is to ensure Executive Board members, Section officers, Committee Chairs, and contractors carry certain duties and responsibilities for the well-being of the Georgia Public Health Association (“GPHA”). This Code of Conduct outlines some of those duties and responsibilities in accordance with governing documents.

2.0 AUTHORITY

The Georgia Public Health Association, Inc. (GPHA) Code of Conduct Policy and Procedures is published under the authority of GPHA and in compliance with the following:

2.1 Bylaws of the Georgia Public Health Association, Inc.

2.1.1 501(c)(3) of the Internal Revenue Code

2.1.2 GPHA Executive Board

3.0 DEFINITIONS

3.1 GPHA – Georgia Public Health Association, Inc.

3.2 The Association – GPHA

4.0 SCOPE

This policy applies to Executive Board members, Section officers, Committee Chairs, and contractors of the Georgia Public Health Association, Inc.

5.0 POLICY

5.1 All Executive Board members, Section officers, Committee Chairs, and contractors must:

5.1.1 Faithfully abide by the articles of incorporation, bylaws and policies and procedures of the organization;

5.1.2 Act in the best interests of, and fulfill their obligations to, GPHA and its members;

5.1.3 Act honestly, fairly, ethically and with integrity;

5.1.4 Conduct themselves in a professional, courteous and respectful manner;

5.1.5 Comply with all applicable laws, rules and regulations;

5.1.6 Act in good faith, responsibly, with due care, competence and diligence, without allowing their independent judgment to be subordinated;

- 5.1.7 Act in a manner to enhance and maintain the reputation of GPHA;
 - 5.1.8 Disclose potential conflicts of interest that they may have regarding any matters that may come before the Board, and abstain from discussion and voting on any matter, in which the Director has or may have a conflict of interest;
 - 5.1.9 Make available to and share with Directors any information that may be appropriate to ensure proper conduct and sound operation of GPHA's governance and management;
 - 5.1.10 Respect the confidentiality of information relating to the affairs of GPHA acquired in the course of service, except when authorized or legally required to disclose such information;
 - 5.1.11 Not use information acquired in the course of service for personal advantage;
 - 5.1.12 Not violate any federal, state or local laws governing the organization and to understand and adhere with all governing documents applicable to GPHA;
 - 5.1.13 Ensure the right of all members to access benefits and services without discrimination in respect to gender, sexual orientation, national origin, race, religion, age, political affiliation or disability, in accordance with all applicable legal and regulatory requirements.
- 5.2 Violations of the Code of Conduct may result in disciplinary action in accordance with the governing documents. Discipline may include removal of an Executive Board member, Section officer, Committee Chair, and contractor from office.

6.0 RESPONSIBILITIES

- 6.1 The Executive Board shall ensure compliance to this policy.
- 6.2 All officers and members of the Association are responsible to adhere to this policy.

7.0 PROCEDURES

- 7.1 A copy of this code of conduct policy shall be furnished to each Executive Board member, Section officer, Committee Chair, and contractor who is presently serving this organization or who may become associated with it.

8.0 REVISION HISTORY

REVISION #	REVISION DATE	REVISION COMMENTS
0	7/1/2015	Initial Issue
1	4/4/2019	New template & Updates

9.0 RELATED FORMS & DOCUMENTS

Form #GEN-04701A – GPHA Annual Reviews & Acknowledgements Form



GEORGIA PUBLIC HEALTH ASSOCIATION, INC. POLICY # GEN-03601 WHISTLE BLOWER POLICY AND PROCEDURES

1.0 PURPOSE

Georgia Public Health Association (“GPHA”) is committed to high standards of ethical, moral and legal business conduct. In line with this commitment and GPHA’s commitment to open communication, this policy provides an avenue for Executive Board members, Section officers, Committee Chairs, and contractors to raise concerns.

The whistleblower policy is intended to provide a mechanism for the reporting of illegal activity or the misuse of the Georgia Public Health Association’s (GPHA) assets while protecting the member(s) who make such reports from retaliation.

The Whistleblower Policy is intended to offer protections if a member raises concerns, including but not limited to:

- 1.1 incorrect financial reporting;
- 1.2 unlawful activity;
- 1.3 activities that are not in line with GPHA policy or Code of Conduct; or
- 1.4 any other activities that constitute serious improper conduct.

2.0 AUTHORITY

The Georgia Public Health Association, Inc. (GPHA) Whistle Blower Policy & Procedures is published under the authority of GPHA and in compliance with the following:

- 2.1 Bylaws of the Georgia Public Health Association, Inc.
- 2.2 501(c)(3) of the Internal Revenue Code
- 2.3 GPHA Executive Board

3.0 DEFINITIONS

- 3.1 GPHA – Georgia Public Health Association, Inc.
- 3.2 The Association – GPHA

4.0 SCOPE

This policy applies to all Executive Board members, Section officers, Committee Chairs, and contractors of the Georgia Public Health Association, Inc.

5.0 POLICY

- 5.1 This policy is designed to address situations in which a member suspects the illegal acts or questionable conduct involving the GPHA’s assets. This conduct may include:

- 5.1.1 Outright theft (of equipment or cash);
- 5.1.2 Fraudulent expense reports;
- 5.1.3 Misstatements of any accounts to Executive Board members, Section officers, Committee Chairs, contractor and member or to the GPHA's auditors, or;
- 5.1.4 A members' conflict of interest that results in harm to the GPHA.
- 5.2 GPHA encourages staff to report such questionable conduct as referenced in Section 7.0 Procedures.
- 5.3 If an Executive Board member, Section officer, Committee Chair, contractor or member suspects illegal conduct of conduct involving misuse of the GPHA's assets or in violation of the law, they should report it, and will be protected against any form of harassment, intimidation, discrimination, or retaliation for making such a report in good faith.
- 5.4 Anyone reporting a concern must act in good faith and have reasonable grounds for believing the information disclosed indicates an improper accounting or auditing practice, or a violation of the Code of Conduct.
- 5.5 A member can make a report to any of the following GPHA executives at any time: President, Treasurer, or Vice-President.
- 5.6 GPHA will promptly conduct an investigation into matters reported, keeping the informant's identity as confidential as possible consistent with our obligation to conduct a full and fair investigation.
- 5.7 A member who has made a report of suspicious conduct and who subsequently believes he or she has been subjected to retaliation of any kind is directed to immediately report it to the President, Treasurer, or Vice-president as appropriate.
- 5.8 Reports or retaliation will be investigated promptly and in a manner to protect confidentiality as much as practicable, consistent with a full and fair investigation. The party conducting the investigation will notify the member the results of the investigation.
- 5.9 GPHA strongly disapproves of and will not tolerate any form of retaliation against members who report concerns in good faith regarding the GPHA's operations. Any member who engages in such retaliation will be subject to discipline up to and including termination of membership.
- 5.10 The act of making allegations that prove to be unsubstantiated, and that prove to have been made maliciously, recklessly, or with the foreknowledge that the allegations are false, will be viewed as a serious disciplinary offense and may result in discipline, up to and including dismissal from the volunteer position or termination of membership. Such conduct may also give rise to other actions, including civil lawsuits.
- 5.11 An Executive Board member, Section officer, Committee Chair, contractor or member who retaliates against someone who has reported a concern in good faith is subject to discipline up to and including dismissal from the volunteer position or termination of membership.
- 5.12 This Whistleblower Policy is intended to encourage members to raise serious concerns within the organization prior to seeking resolution outside of the organization.

- 5.13 Disclosure of reports of concerns to members not involved in the investigation will be viewed as a serious disciplinary offense and may result in discipline, up to and including dismissal from the volunteer position or termination of membership. Such conduct may also give rise to other actions, including civil lawsuits.

6.0 RESPONSIBILITIES

- 6.1 The Executive Board shall ensure compliance to this policy.
- 6.2 All Executive Board members, Section officers, Committee chairs, Independent Contractors, volunteers, and members of the Association are responsible to adhere to this policy.
- 6.3 It is the responsibility of all Executive Board members, Section officers, Committee chairs, Independent Contractors, volunteers and members to comply with the Code of Conduct and to report violations or suspected violations in accordance with this Whistleblower Policy.

7.0 PROCEDURES

- 7.1 An Executive Board member, Section officer, Committee chair, Independent Contractors, volunteer and member makes a report of suspected misuse of the GPHA's assets by reporting in person or reporting anonymously to the President, Treasurer, or Vice-president.
- 7.2 The report is promptly reviewed by the President, as well as the Treasurer, to determine whether the report constitutes a complaint or a non-complaint, unless one of them is allegedly involved in the misconduct, in which case the report should be reviewed by only one of them. If both of them are alleged to be involved, the report should go directly to the President-elect.
- 7.3 A complaint means any report involving:
- 7.3.1 Questionable accounting, auditing, financial reporting, or internal controls;
 - 7.3.2 Suspected fraud, theft, or improper use of the Association's assets;
 - 7.3.3 A violation of GPHA conflict-of-interest policy that results in financial harm to GPHA; or (iv) a claim of retaliation against any member making a good-faith report regarding any of the preceding matters.
 - 7.3.4 A non-complaint means a report of any other matter not involving misuse of the GPHA's assets.
- 7.4 If the report is deemed to be a complaint, it will be promptly investigated and forwarded to the Treasurer.
- 7.5 If the report is deemed to be a non-complaint, it will be forwarded to the President for follow-up. Some non-complaints may involve serious matters and may require prompt investigation, but may nevertheless not involve the misuse of GPHA's assets.
- 7.6 Each complaint is fully investigated, and as far as possible handled as so to protect the privacy of the member making the complaint.

- 7.7 A written report of the outcome of each investigation is prepared and delivered to the Treasurer.
- 7.8 The Treasurer decides whether the report involves a matter that is material. If it is deemed to be material, it is reviewed by the full Finance Committee, which forwards it to the Executive Committee for disposition or the Executive Committee may direct it to the Executive Board to take actions to resolve the situation.
- 7.9 If the report is deemed non-material, it is not reviewed by the Finance Committee but referred to the Executive Committee or Executive Board as appropriate.
- 7.10 Handling of Reported Violations
- 7.10.1 The Vice President shall immediately notify the President and the members of the Executive Committee of reported concerns. The Vice President will notify the sender and acknowledge receipt of the concern within five business days, if possible. It will not be possible to acknowledge receipt of anonymously submitted concerns.
- 7.10.2 The Executive Committee is responsible for promptly investigating and resolving all reported concerns. All reports shall be promptly investigated within a reasonable period of time, and appropriate corrective action shall be recommended to the Executive Board, if warranted by the investigation. In addition, action taken must include a conclusion and/or follow-up with the reporting individual for complete closure of the concern.
- 7.10.3 The Executive Committee has the authority to retain outside legal counsel, contracted accountants, private investigators, or any other resource deemed necessary to conduct a full and complete investigation of the allegations.

8.0 REVISION HISTORY

REVISION #	REVISION DATE	REVISION COMMENTS
0	1/23/2013	Initial Issue
1	4/4/2019	New Template and formatting

9.0 REFERENCES & FORMS

None



GEORGIA PUBLIC HEALTH ASSOCIATION, INC. POLICY # FIN-01701 EXPENDITURE POLICY AND PROCEDURES

1.0 PURPOSE

This policy is for the purpose of:

- 1.1 Establishing guidelines for the disbursing of GPHA funds
- 1.2 Establishing the proper documentation for disbursement of funds
- 1.3 Prohibiting the use of funds for the direct personal benefit of members

2.0 AUTHORITY

The Georgia Public Health Association, Inc. (GPHA) Expenditure Policy and Procedures is published under the authority of GPHA and in compliance with the following:

- 2.1 Bylaws of the Georgia Public Health Association, Inc.
- 2.2 501(c)(3) of the Internal Revenue Code
- 2.3 GPHA Executive Board

3.0 DEFINITIONS

- 3.1 GPHA – Georgia Public Health Association, Inc.
- 3.2 The Association – GPHA
- 3.3 Finance Committee – Standing committee of the Association

4.0 SCOPE

This policy applies to all Executive Board members, Section officers, Committee chairs, Independent Contractors, and members of the Georgia Public Health Association, Inc.

5.0 POLICY

- 5.1 All GPHA expenditures will be processed accurately, timely and documented.
- 5.2 No party shall commit to a financial obligation on behalf of GPHA other than as specified in the policies and procedures.
- 5.3 The Contracted accountant shall have sole access to the distribution of checks on behalf of GPHA.
- 5.4 All expenditures require approval of the Treasurer.

- 5.5 All expenditures in the amount of \$1,500 or greater require both the approval of the Treasurer and the President-Elect.
- 5.6 Non-budgeted items exceeding \$5,000 must be approved by the Executive Committee.
- 5.7 GPHA does not advance funds to individuals for any purpose. Individuals will be reimbursed based upon a valid receipt for a prior approved purchase.
- 5.8 Funds shall not be used for the personal benefit of any officers or members of the Association.
- 5.9 The Treasurer, President-Elect and contracted accountant, authorized to withdraw funds or make payments from GPHA accounts shall be bonded at the expense of GPHA.
- 5.10 Services used by the Executive Services Provider such as printing, materials purchased for the annual meeting and other events, will be at the discretion of the Executive Services Provider with appropriate consultation of the Finance Committee for any unbudgeted expenditures in excess of \$1,499.00.
- 5.11 Operational expenses incurred by the Executive Services Provider covered under the adopted budget, will be considered approved unless the cost exceeds the budgeted amount for the line item.
- 5.12 The Executive Services Provider will attend all GPHA sponsored events at the expense of GPHA.
- 5.13 Any non-budgeted expenditure will require prior approval of the Executive Committee.

6.0 RESPONSIBILITIES

- 6.1 The Executive Board shall ensure compliance to this policy.
- 6.2 The Finance Committee is responsible for reviewing and updating this policy.
- 6.3 The Finance Committee will be responsible for developing the financial tracking for all expenditures.
- 6.4 All Executive Board members, Section officers, Committee chairs, Independent Contractors and members of the Association are responsible to adhere to this policy.
- 6.5 The Executive Services Provider will provide the necessary forms for use by all GPHA members for the proper approval of anticipated expenses.
- 6.6 It will be the responsibility of the Executive Services Provider to advise the Finance Committee and Treasurer of all anticipated expenditures with the exception of normal supplies and equipment necessary to provide administrative support for the organization.
- 6.7 The contracted accountant shall have sole access to the distribution of checks on behalf of GPHA.
- 6.8 Services to be purchased such as accounting, insurance, legal consultation and contract services will be under the direct supervision of the Finance Committee with proposals being sought for best price.

- 6.8.1 The Treasurer will have responsibility for monitoring these proposals, reporting recommendations to the Executive Board and retaining the original proposals on file in accordance with the records retention policy.
- 6.9 Payments & Honorariums: Payments made to individuals for honorariums or guest speaker fees are considered to be taxable income to the recipients.
 - 6.9.1 Unless payment is made to a corporate entity, all amounts paid during any calendar year which exceed a maximum of \$600 are required to be reported to the recipient on Form 1099 by January 31 of the following year and also to the Internal Revenue Service. Form 1099 shall be prepared by the contracted accountant and forwarded to the Treasurer for review and distribution to the recipients.

7.0 PROCEDURES

- 7.1 Executive Services Provider initiates Check Request forms for approval of all expenditures (including all contracts) and forwards to the Treasurer, and President Elect if the amount exceeds \$1,500, for approval. Treasurer, and President Elect if necessary, approves Check Request in accordance with the approved operating budget and forwards to Contracted accountant for payment on a weekly basis.
- 7.2 Executive Services Provider will provide contracted accountant address, phone and fax changes; Contracted accountant will include a note with checks advising of changes in mailing address, phone or fax numbers.
- 7.3 Executive Services Provider will receive payments, make deposits and receive the credit card detail.
- 7.4 Executive Services Provider will forward monthly deposit detail to contracted accountant by the 7th business day of the following month.
- 7.5 Executive Services Provider will send to contracted accountant a copy of the approved annual budget when finalized and any budget revisions when approved.
- 7.6 Each section will provide to the Executive Services Provider, the names of the individuals in that section who are allowed to request/authorize reimbursements from the funds of that section. Each section is responsible for updating this authorization list at least annually, or whenever changes of authorized person(s) have been approved by the section.
- 7.7 In the event a section does not meet the aforementioned requirements, annually the Executive Services Provider shall settle expenses incurred by the section within the section's account fund balance.
- 7.8 The Executive Services Provider will email the completed Check Request with supporting documentation to the Treasurer for approval and signature.
- 7.9 The Treasurer will email all signed check requests not exceeding \$1,500 to the contracted accountant for payment and copy the Executive Services Provider.
- 7.10 The Treasurer will email all signed check requests greater than \$1,500 to the President Elect for approval and signature.

- 7.11 The President-elect will email all signed check requests greater than \$1,500 to the contracted accountant for payment and copy the Executive Services Provider. .
- 7.12 The contracted accountant will pay approved check requests.
- 7.13 The contracted accountant provides the reconciled monthly bank statement and corresponding financial reports to the Treasurer and copies the Executive Services Provider.
- 7.14 For all honorariums over \$600, Form 1099 shall be prepared by the contracted accountant and forwarded to the recipients.
- 7.15 The Executive Services Provider will advise the Finance Committee and Treasurer of all anticipated expenditures necessary to provide administrative support for the organization.

8.0 REVISION HISTORY

REVISION #	REVISION DATE	REVISION COMMENTS
0	1/23/2013	Initial Issue
1	7/1/2015	Updates
2	4/4/2019	New Template and Formatting

9.0 RELATED FORMS

Form #FIN-01701A – Check Request Form



**GEORGIA PUBLIC HEALTH ASSOCIATION, INC.
POLICY # FIN-01702
SECTION FEE ALLOCATION POLICY & PROCEDURES**

1.0 PURPOSE

This policy is for the purpose of:

Establishing the method of allocation of fees to each Section of the Association

2.0 AUTHORITY

The Georgia Public Health Association, Inc. (GPHA) Section Fee Allocation Policy and Procedures is published under the authority of GPHA and in compliance with the following:

2.1 Bylaws of the Georgia Public Health Association, Inc.

2.1.1 501(c)(3) of the Internal Revenue Code

2.1.2 GPHA Executive Board

2.1.3 Policy #FIN-01701

3.0 DEFINITIONS

3.1 GPHA – Georgia Public Health Association, Inc.

3.2 The Association – GPHA

3.3 Finance Committee – Standing committee of the Association

4.0 SCOPE

This policy applies to all Executive Board members, Section officers, and Committee Chairs, and members of the Georgia Public Health Association, Inc.

5.0 POLICY

5.1 Five (5) dollars of all membership dues shall be allocated to general section dues with the exception of, Board of Health and Retiree memberships. Of the Board of Health membership fee of \$315, \$35 shall be allocated to the Board of Health Section. The Retiree membership does not include section affiliation, but one or more may be purchased at \$5 per section.

5.2 Individual members of all membership types, including Retirees, may join additional sections at a cost of \$5 per section.

5.3 The Executive Services Provider prepares a report of the total number of paid members per section as of June 30th, each year.

5.4 The Treasurer shall determine the allocation due to each section based on the formula as approved by the Executive Board.

- 5.5 The contracted accountant shall make a journal entry to record the section's annual allocation based on the approved formula.
- 5.6 Any and all expenses incurred by GPHA on behalf of sections shall be satisfied prior to the release of any funds.
- 5.7 All section funds will be held by GPHA in the GPHA bank account(s) as restricted funds. No section will be allowed to maintain funds outside of GPHA financial operations.
- 5.8 Any balance remaining in a section's account on June 30th shall be rolled over in the section's account for the next fiscal year.

6.0 RESPONSIBILITIES

- 6.1 The Executive Board shall ensure compliance to this policy.
- 6.2 The Finance Committee is responsible for reviewing and updating this policy.
- 6.3 All officers and members of the Association are responsible to adhere to this policy.

7.0 PROCEDURES

- 7.1 The following formula shall be used to allocate section dues proportionately:

EXAMPLE

Total Section Fees (\$5.00) Collected	\$1,500
Deduction of Base Amount (#of Sections, 13 X Base Amount, \$50)	\$650
Other Deductions	0
Remainder to Allocate	\$850

Section	Number of Paid Members	Allocation %	Allocation \$ Amount	Rounding Adjustment	Base Amount	Total Amount
1	10	3.333%	28.33		50.00	78.33
2	20	6.667%	56.67		50.00	106.67
3	35	11.667%	99.17		50.00	149.17
4	18	6.000%	51.00		50.00	101.00
5	16	5.333%	45.33		50.00	95.33
6	10	3.333%	28.33		50.00	78.33
7	20	6.667%	56.67		50.00	106.67
8	15	5.000%	42.50		50.00	92.50
9	20	6.667%	56.67		50.00	106.67
10	30	10.000%	85.00		50.00	135.00
11	50	16.667%	141.67	-0.01	50.00	191.66
12	20	6.667%	56.67		50.00	106.67
13	36	12.000%	102.00		50.00	152.00
	300	100.01%	\$850.01	-0.01	\$650.00	\$1,500.00

The above is an example using 13 sections with a base allotment of \$50.00 per section. Section 10 has 30 members with paid dues. Divide 300 total members with paid dues into 30 members for that section which gives you 10%. \$850 total remainder of funds to allocated x10% equals \$85 plus \$50 base for that section which gives them a total of \$135.

- 7.2 The amount (after the \$50.00 base) is calculated according to the number of paid members per section. \$1,500 - \$650 (\$50 for each section) = \$850
- 7.3 The Executive Services Provider shall provide periodic account balances to the sections at Executive Board meetings.

8.0 REVISION HISTORY

REVISION #	REVISION DATE	REVISION COMMENTS
0	7/1/2015	Initial Issue
1	4/4/2019	New Template & Updates

9.0 RELATED FORMS & DOCUMENTS

Form #FIN-01701A – Check Request Form
 FIN-01701 – Expenditure Policy and Procedures



**GEORGIA PUBLIC HEALTH ASSOCIATION, INC.
POLICY # FIN-01703
SPEAKERS' FEES/TRAVEL & ACCOMODATIONS
COST POLICY & PROCEDURES**

1.0 PURPOSE

This policy is for the purpose of:

Establishing guidelines by which GPHA may recruit speakers and presenters with minimal cost to the Association.

2.0 AUTHORITY

The Georgia Public Health Association, Inc. (GPHA) Speakers' Fees/Travel and Accommodations Cost Policy and Procedures is published under the authority of GPHA and in compliance with the following:

- 2.1 Bylaws of the Georgia Public Health Association, Inc.
- 2.2 501(c)(3) of the Internal Revenue Code
- 2.3 GPHA Executive Board
- 2.4 Policy #FIN-01701

3.0 DEFINITIONS

- 3.1 GPHA – Georgia Public Health Association, Inc.
- 3.2 The Association – GPHA
- 3.3 Finance Committee – Standing committee of the Association

4.0 SCOPE

This policy applies to all Executive Board members, Section officers, Committee chairs, Independent Contractors, and members of the Georgia Public Health Association, Inc.

5.0 POLICY

- 5.1 The Association seeks keynote speakers not requiring an honorarium. However, if costs are incurred to secure a particularly sought speaker, every attempt shall be made to secure a sponsor to offset that expense.
- 5.2 The Association does not pay fees, honoraria or travel expenses to workshop presenters.
- 5.3 Workshop presenters are responsible to register for the conference at their own expense.
- 5.4 The Treasurer will present the Executive Committee with a preliminary proposed annual budget, that includes the coverage of speaker and/or workshop presenter expenses, if any, for approval to present to the Executive Board for final acceptance

- 5.5 Conference Speakers and workshop presenters are responsible for their own travel and accommodation costs, unless otherwise budgeted.
- 5.6 Sections may pay a Speaker fee/honorarium and/or pay for travel accommodations if funds are available in the Section's account.
- 5.7 No individual except the President or Vice-President may negotiate a payment or honorarium on behalf of the GPHA, unless otherwise budgeted except as specified in 5.6.
- 5.8 For tax purposes, with the approval of the Executive Committee, a receipt may be provided to individuals providing professional services of time and value to the Association.

6.0 RESPONSIBILITIES

- 6.1 The Executive Board shall ensure compliance to this policy.
- 6.2 The Finance Committee is responsible for reviewing and updating this policy.
- 6.3 The Finance Committee is responsible for drafting a preliminary proposed budget.
- 6.4 The Finance Committee will be responsible for developing the financial tracking for all expenditures.
- 6.5 All officers and members of the Association are responsible to adhere to this policy.

7.0 PROCEDURES

- 7.1 Speaker fees and travel accommodations that have been approved by the Executive Committee and included in the budget shall be paid in accordance with the procedures outlined in the Expenditure policy.
- 7.2 GPHA will attract and feature workshop presenters who can add to the educational content of GPHA's programs with a minimum of cost to GPHA. Speakers and presenters should be sought from within the organization or from organizations having a public health focus.

8.0 REVISION HISTORY

REVISION #	REVISION DATE	REVISION COMMENTS
0	1/23/2013	Initial Issue
1	7/1/2015	Updates
2	4/4/2019	New Template & Updates

9.0 RELATED FORMS & DOCUMENTS

Form #FIN-01701A – Check Request Form
 FIN-01701 – Expenditure Policy and Procedures



**GEORGIA PUBLIC HEALTH ASSOCIATION, INC.
POLICY # FIN-01704
FINANCIAL RECORDS AUDIT POLICY AND
PROCEDURES**

1.0 PURPOSE

This policy is for the purpose of:

- 1.1 Establishing internal controls for separation of duties and responsibilities
- 1.2 Conducting an independent annual audit and compilation of financial activity by a certified public contracted certified public accountant (CPA).

2.0 AUTHORITY

The Georgia Public Health Association, Inc. (GPHA) Financial Records Audit Policy and Procedures is published under the authority of GPHA and in compliance with the following:

- 2.1 Bylaws of the Georgia Public Health Association, Inc.
- 2.2 501(c)(3) of the Internal Revenue Code
- 2.3 GPHA Executive Board

3.0 DEFINITIONS

- 3.1 GPHA – Georgia Public Health Association, Inc.
- 3.2 The Association – GPHA
- 3.3 Finance Committee – Standing committee of the Association

4.0 SCOPE

This policy applies to all Executive Board members, Section officers, Committee chairs, Independent Contractors, and members of the Georgia Public Health Association, Inc.

5.0 POLICY

- 5.1 GPHA shall have an independent annual audit and compilation of financial activity by a contracted certified public accountant (CPA).
- 5.2 This contracted auditor shall be approved by the GPHA Executive Board and Committee and paid under a contractual agreement signed by both parties.
- 5.3 Audit finding(s) will be made available to the Executive Board and Committee by the contracted auditor conducting the audit no later than thirty days following the completion of the audit.
- 5.4 The contracted auditor will present the findings at a regular Board meeting.

5.5 The Executive Board will arrange to have all negative audit findings detailed by the contracted auditor with recommendations for corrections and or improvements in financial operations.

6.0 RESPONSIBILITIES

6.1 The Executive Board shall ensure compliance to this policy.

6.2 The Finance Committee is responsible for reviewing and updating this policy.

6.3 The Finance Committee will be responsible for developing the financial tracking for all expenditures.

7.0 PROCEDURES

7.1 The Treasurer will ensure that monthly bank statements and financial reports have been reviewed.

7.2 Prior to submission to the independent contracted auditor, the contracted accountant will ensure that bank statements and financial reports are reconciled per generally accepted accounting principles.

7.3 The contracted accountant shall maintain electronic copies of all financial records and provide requested documents upon request to the contracted independent auditor.

8.0 REVISION HISTORY

REVISION #	REVISION DATE	REVISION COMMENTS
0	1/23/2013	Initial Issue
1	7/1/2015	Updates
2	4/4/2019	New Template & Updates

9.0 RELATED FORMS

None



GEORGIA PUBLIC HEALTH ASSOCIATION, INC.

POLICY # FIN-01705

REVENUE POLICY AND PROCEDURES

1.0 PURPOSE

This policy is for the purpose of:

- 1.1 Establishing guidelines for receipt of funds
- 1.2 Prohibiting the use of funds for the direct personal benefit of members

2.0 AUTHORITY

The Georgia Public Health Association, Inc. (GPHA) Revenue Policy and Procedures is published under the authority of GPHA and in compliance with the following:

- 2.1 Bylaws of the Georgia Public Health Association, Inc.
- 2.2 501(c)(3) of the Internal Revenue Code
- 2.3 GPHA Executive Board

3.0 DEFINITIONS

- 3.1 GPHA – Georgia Public Health Association, Inc.
- 3.2 The Association – GPHA
- 3.3 Finance Committee – Standing committee of the Association

4.0 SCOPE

This policy applies to all Executive Board members, Section officers, Committee chairs, Independent Contractors, and members of the Georgia Public Health Association, Inc.

5.0 POLICY

The following are revenue sources for GPHA:

- 5.1 **Promotional Sales:** Funds received as a result of promotional sales will be tracked as revenue.
- 5.2 **Administrative Fees:** GPHA will assess an administrative fee of 10% for activities providing oversight and administration for meeting arrangements or association/grant activities.
 - 5.2.1 GPHA's Executive Board must approve all such requests in advance of the activity.
- 5.3 **Receipt of Financial Support from Commercial and For-profit Vendors:** GPHA shall accept donations from commercial and for-profit vendors as contributions to or sponsorships of various GPHA events.

5.3.1 The donor shall receive recognition in the event literature for which they are supporting.

5.3.2 The Executive Services Provider shall provide the vendor with a receipt for tax purposes.

5.4 **Contributions and Quid Pro Quo Benefits:** GPHA shall provide a good faith estimate of the fair market value of goods and services when the contribution received exceeds \$75.00 and the donor receives some type of a quid pro quo benefit, i.e., a meal, registration, exhibit, etc.

5.4.1 The contracted accountant shall provide acknowledgement to the donor as stipulated in this section for tax purposes using the appropriate Acknowledgement of Donation template GPHA-FIN-2001-05 rev. 3/28/2008 on GPHA letterhead.

5.5 **Gifts, Memorials, Donations, and Pledges:** Organizations and individuals may contribute memorials, gifts, donations and pledges to GPHA for general or restricted use.

5.5.1 These donations are tax deductible.

5.5.2 GPHA shall provide the benefactor with a receipt for tax purposes using the appropriate Acknowledgement of Donation template GPHA-FIN-2001-05 rev. 3/28/2008 on GPHA letterhead.

6.0 RESPONSIBILITIES

6.1 The Executive Board shall ensure compliance to this policy.

6.2 The Finance Committee is responsible for reviewing and updating this policy.

6.3 The Finance Committee will be responsible for developing the financial tracking for all expenditures.

7.0 PROCEDURES

All receipts of GPHA will be collected through the GPHA Office and will be administered for processing as follows:

7.1 Checks/other forms of payment received by GPHA for any purpose shall be dated as received;

7.2 Each supporting document will be noted with the check #/form of payment and the amount;

7.3 The Executive Services Provider will post the receipt to GPHA-FIN-2001-03CK (checks/cash) and GPHA-FIN-2004-03CC (credit cards);

7.4 Receipt Transmittals form and mail at least weekly to the Treasurer;

7.5 The Executive Services Provider will note the purpose for the receipt on the transmittal form with the receipts, and will provide a sequential number for each transmittal.

- 7.6 Checks and cash will be submitted on GPHA-FIN 2001-03CK and credit card payments will be submitted on GPHA-FIN-2001-03CC.
- 7.7 The Executive Services Provider will keep a record of all transmittals.
- 7.8 The Treasurer will keep a copy of all transmittals for auditing purposes. In the absence of an Executive Services Provider, the Association President or designee who is an Association officer shall receive, prepare and deposit incoming receipts except that credit card transactions may be batched and forwarded to the Treasurer through contracted services.

8.0 REVISION HISTORY

REVISION #	REVISION DATE	REVISION COMMENTS
0	1/23/2013	Initial Issue
1	7/1/2015	Updates
2	4/4/2019	New Template & Formatting

9.0 RELATED FORMS

Form #GPHA-FIN-2001-03CK
 Form #GPHA-FIN-2001-03CC
 Form #GPHA-FIN-2004-03CC



**GEORGIA PUBLIC HEALTH ASSOCIATION, INC.
POLICY # FIN-01706
RETURNED CHECKS POLICY AND PROCEDURES**

1.0 PURPOSE

This policy is for the purpose of:

- 1.1 Establishing guidelines for the processing of returned checks
- 1.2 Establishing the proper documentation needed of funds

2.0 AUTHORITY

The Georgia Public Health Association, Inc. (GPHA) Returned Checks Policy and Procedures is published under the authority of GPHA and in compliance with the following:

- 2.1 Bylaws of the Georgia Public Health Association, Inc.
- 2.2 501(c)(3) of the Internal Revenue Code
- 2.3 GPHA Executive Board

3.0 DEFINITIONS

- 3.1 GPHA – Georgia Public Health Association, Inc.
- 3.2 The Association – GPHA
- 3.3 Finance Committee – Standing committee of the Association

4.0 SCOPE

This policy applies to all Executive Board members, Section officers, Committee chairs, Independent Contractors, and members of the Georgia Public Health Association, Inc.

5.0 POLICY

- 5.1 A \$25.00 fee shall be assessed for all returned checks due to non-sufficient funds (NSF).

6.0 RESPONSIBILITIES

- 6.1 The Executive Board shall ensure compliance to this policy.
- 6.2 The Finance Committee is responsible for reviewing and updating this policy.

7.0 PROCEDURES

- 7.1 Upon receipt of a returned check for NSF, the Executive Services Provider shall notify the individual that the check was returned unpaid.

- 7.2 The Executive Services Provider shall advise that payment of the amount of the check plus the \$25.00 fee is due immediately.
- 7.3 Upon receipt of the payment, the Executive Services Provider shall destroy the original returned check with permission or mail it to the individual.

8.0 REVISION HISTORY

REVISION #	REVISION DATE	REVISION COMMENTS
0	1/23/2013	Initial Issue
1	7/1/2015	Updates
2	4/4/2019	New Template & Updates

9.0 RELATED FORMS

None



**GEORGIA PUBLIC HEALTH ASSOCIATION, INC.
POLICY # FIN-01707
FUNDRAISING ACTIVITY POLICY AND
PROCEDURES**

1.0 PURPOSE

This policy is for the purpose of:

- 1.1 Establishing guidelines for the fundraising activities in support of the mission of the Association

2.0 AUTHORITY

The Georgia Public Health Association, Inc. (GPHA) Fundraising Activity Policy and Procedures is published under the authority of GPHA and in compliance with the following:

- 2.1 Bylaws of the Georgia Public Health Association, Inc.
- 2.2 501(c)(3) of the Internal Revenue Code
- 2.3 GPHA Executive Board

3.0 DEFINITIONS

- 3.1 GPHA – Georgia Public Health Association, Inc.
- 3.2 The Association – GPHA
- 3.3 Finance Committee – Standing committee of the Association

4.0 SCOPE

This policy applies to all Executive Board members, Section officers, Committee chairs, Independent Contractors, and members of the Georgia Public Health Association, Inc.

5.0 POLICY

- 5.1 Whereas GPHA is increasing its membership, building the credibility of its annual meeting and fleshing out its strategic agenda, GPHA desires to be serious and deliberate in its fundraising.
- 5.2 Funds shall be raised for many purposes in GPHA, i.e. scholarship support, scholarly and academic activities, annual program events, speakers for annual meeting and other events.
- 5.3 All funding requests shall be specific, depending upon the purposes and the potential funding source.
- 5.4 The Executive Services Provider shall enter into contractual relationships only with the prior approval of the Executive Board.

- 5.5 Other individuals are not authorized to enter into any contractual arrangements either written or verbal on behalf of GPHA.
- 5.6 GPHA's Executive Committee must approve all fund-raising activities prior to release or submission of any request for funding.
- 5.7 Any solicitation for goods, services, food, or in-kind contributions using the GPHA name must have approval of the Executive Committee prior to the act.
- 5.8 No GPHA Section may raise funds or solicit goods/services without prior approval by the Executive Committee.
- 5.9 GPHA will seek the consultation of professionals in the area of investing and endowing funds for the future strength of GPHA.
- 5.10 GPHA enters into contractual relationships with exhibitors, vendors and contracted organizations as a method of providing support for various events and co-sponsorships.
- 5.11 Funding of these events is not in any way conditioned upon any present or future business relationship between the independent contractor and GPHA.
- 5.12 Only the Executive Services Provider shall enter these contractual relationships.
- 5.13 GPHA maintains sole responsibility and control over the content and conduct of programs focused on the science and education of its membership through the Executive Board. All such programs must remain free from commercial bias.
- 5.14 Individual members, sections and committees shall not obligate GPHA for any expenses allocated above and beyond the funds budgeted for their committees or allocated for the sections.

6.0 RESPONSIBILITIES

- 6.1 The Executive Board shall ensure compliance to this policy.
- 6.2 The Finance Committee is responsible for reviewing and updating this policy.
- 6.3 The Finance Committee will be responsible for developing the financial tracking for all expenditures.
- 6.4 It shall be the responsibility of the Executive Services Provider to research and recommend such requests to the Finance Committee.
- 6.5 It shall be the responsibility of the Executive Services Provider to follow-up on all such requests, and acknowledge donations when they are received.
- 6.6 Collaboration and Cooperative Agreements: While GPHA enters into collaborative and cooperative agreements with other health related organizations, it will be the responsibility of the Executive Services Provider to present such proposed collaborations and cooperative agreements to the Executive Board for consideration and approval prior to executing a contract/agreement.

7.0 PROCEDURES

7.1 Upon recommendation of the Finance Committee, all such requests shall be forwarded to the Executive Board for approval.

8.0 REVISION HISTORY

REVISION #	REVISION DATE	REVISION COMMENTS
0	1/23/2013	Initial Issue
1	4/4/2019	New Template & Updates

9.0 RELATED FORMS

Form #FIN-01701A – Check Request Form



**GEORGIA PUBLIC HEALTH ASSOCIATION, INC.
POLICY # FIN-01708
ANNUAL MEETING REGISTRATION, SUBSTITUTION,
& CANCELATION POLICY AND PROCEDURES**

1.0 PURPOSE

This policy is for the purpose of:

- 1.1 Establishing guidelines for Annual Meeting registration
- 1.2 Prohibiting the use of funds for the direct personal benefit of members

2.0 AUTHORITY

The Georgia Public Health Association, Inc. (GPHA) Annual Meeting Registration, Substitution & Cancellation Policy and Procedures is published under the authority of GPHA and in compliance with the following:

- 2.1 Bylaws of the Georgia Public Health Association, Inc.
- 2.2 501(c)(3) of the Internal Revenue Code
- 2.3 GPHA Executive Board

3.0 DEFINITIONS

- 3.1 GPHA – Georgia Public Health Association, Inc.
- 3.2 The Association – GPHA
- 3.3 Finance Committee – Standing committee of the Association

4.0 SCOPE

This policy applies to all Executive Board members, Section officers, Committee chairs, Independent Contractors, and members of the Georgia Public Health Association, Inc.

5.0 POLICY

5.1 Annual Meeting Registration Fees:

- 5.1.1 The Executive Board sets the annual meeting registration fees on an annual basis, which may include several different pricing categories and options.

5.2 Early Registration:

- 5.2.1 In the situation of a mailed registration, if the full registration fee is not paid, the member shall be asked at the time of on-site registration to pay the difference.

5.2.2 Early registration will be accepted if it is received or postmarked on or prior to the deadline.

5.3 Annual Meeting Cancellation, Refund, Substitution:

5.3.1 A full refund of the registration fee shall be made if cancellation occurs at least thirty days prior to the Annual Meeting.

5.3.2 No refunds will be made if cancellation occurs within thirty (30) days of Annual Meeting.

5.3.3 Cancellation must be made as indicated on the registration form.

5.3.4 Substitutions shall be allowed at any time.

6.0 RESPONSIBILITIES

6.1 The Executive Board shall ensure compliance to this policy.

6.2 The Finance Committee is responsible for reviewing and updating this policy.

7.0 PROCEDURES

7.1 The Executive Services Provider shall retain all registration data.

7.2 The Executive Services Provider shall provide the registration data to the Registration Committee Chair.

7.3 The Registration Committee shall collect the outstanding balance at the time of registration check-in at the annual meeting.

8.0 REVISION HISTORY

REVISION #	REVISION DATE	REVISION COMMENTS
0	1/23/2013	Initial Issue
1	4/4/2019	New Template & Updates

9.0 RELATED FORMS

None



**GEORGIA PUBLIC HEALTH ASSOCIATION, INC.
POLICY # FIN-01709
APHA REPRESENTATIVE REIMBURSABLE
EXPENSE POLICY AND PROCEDURES**

1.0 PURPOSE

This policy is for the purpose of:

- 1.1 Establishing guidelines for the reimbursement for the APHA representative to attend the Annual APHA conference or other APHA approved travel
- 1.2 Prohibiting the use of funds for the direct personal benefit of members

2.0 AUTHORITY

The Georgia Public Health Association, Inc. (GPHA) APHA Representative Reimbursable Expense Policy and Procedures is published under the authority of GPHA and in compliance with the following:

- 2.1 Bylaws of the Georgia Public Health Association, Inc.
- 2.2 501(c)(3) of the Internal Revenue Code
- 2.3 GPHA Executive Board

3.0 DEFINITIONS

- 3.1 GPHA – Georgia Public Health Association, Inc.
- 3.2 The Association – GPHA
- 3.3 APHA – American Public Health Association
- 3.4 Finance Committee – Standing committee of the Association

4.0 SCOPE

This policy applies to all Executive Board members, Section officers, Committee chairs, Independent Contractors, and members of the Georgia Public Health Association, Inc.

5.0 POLICY

- 5.1 It is the policy of the Georgia Public Health Association to reimburse the designated Georgia Public Health Association, Inc. representative to the American Public Health Association for expenses incurred as a result of attendance at the annual meeting of the American Public Health Association or any other meetings of the American Public Health Association as requested by the Executive Board of the Georgia Public Health Association, Inc., up to the budgeted amount.
- 5.2 Eligible Expenses:

- 5.2.1 Registration for the conference (not to include CEU charges)
 - 5.2.2 Air Fare (coach or economy class only)
 - 5.2.3 Ground Transportation (necessary taxi or public transportation expenses)
 - 5.2.4 Meals (maximum amount based on State of Georgia per diem to state members for such expenses at the time the expense is incurred)
 - 5.2.5 Lodging (must be at an American Public Health Association host hotel at base rate for the conference or equivalent)
- 5.3 The American Public Health Association representative is responsible for his/her individual American Public Health Association membership, CEU charges, alcoholic beverages, souvenirs and other ancillary expenses not noted in the above list of approved reimbursable expenses.

6.0 RESPONSIBILITIES

- 6.1 The Executive Board shall ensure compliance to this policy.
- 6.2 The Finance Committee is responsible for reviewing and updating this policy.

7.0 PROCEDURES

- 7.1 All requests shall be submitted to the Executive Services Provider.

8.0 REVISION HISTORY

REVISION #	REVISION DATE	REVISION COMMENTS
0	1/23/2013	Initial Issue
1	4/4/2019	New Template & Updates

9.0 RELATED FORMS

None



**GEORGIA PUBLIC HEALTH ASSOCIATION, INC.
POLICY # FIN-01710
CONTRACTS POLICY AND PROCEDURES**

1.0 PURPOSE

This policy is for the purpose of:

- 1.1 Establishing guidelines for the entering into contracts
- 1.2 To establish administrative compliance for all contracts entered into by GPHA.

2.0 AUTHORITY

The Georgia Public Health Association, Inc. (GPHA) Contracts Policy and Procedures is published under the authority of GPHA and in compliance with the following:

- 2.1 Bylaws of the Georgia Public Health Association, Inc.
- 2.2 501(c)(3) of the Internal Revenue Code
- 2.3 GPHA Executive Board

3.0 DEFINITIONS

- 3.1 GPHA – Georgia Public Health Association, Inc.
- 3.2 The Association – GPHA
- 3.3 Finance Committee – Standing committee of the Association
- 3.4 Contract, when used in this policy, means any contract and/or agreement utilized by GPHA. Specifically, such contracts and/or agreements include:
 - 3.4.1 Programmatic/professional contracts
 - 3.4.2 Collaborative agreements
 - 3.4.3 Memorandums or Letters of Understanding and/or Agreement
 - 3.4.4 Letters of intent
 - 3.4.5 Revenue contracts
 - 3.4.6 Grant awards
 - 3.4.7 Purchasing contract agreements for services/goods/rentals
 - 3.4.8 Leases
 - 3.4.9 Modification and/or renewal of such documents

4.0 SCOPE

This policy applies to all Executive Board members, Section officers, Committee chairs, Independent Contractors, and members of the Georgia Public Health Association, Inc.

5.0 POLICY

- 5.1 The Georgia Public Health Association, Inc. (GPHA) is the contracting entity for all contracts within the Association. No section, committee, program or individual of the Association shall be such contracting entity. Only the GPHA Board is allowed to approve contracts.
- 5.2 The President is the executory authority for all contracts entered into by GPHA. In their absence or inability to sign, the President-Elect may sign.
- 5.3 All programs or activities performed by GPHA which require a formal contract will not be activated without the execution of such contract. Any necessity of a formal agreement will be resolved through consultation between the section, committee, program or individual desiring the contract, Treasurer and/or the Finance Committee, and the President and/or the Executive Services Provider as may be required. Any proposed exception to this requirement must be submitted to the Executive Board for review and approval.

6.0 RESPONSIBILITIES

- 6.1 The section, committee, program or individual within GPHA desiring to create a contract bears the responsibility to initiate and negotiate the scope and business terms of the contract and to communicate the desired outcome for each contract to the appropriate party or parties.
- 6.2 The section, committee, program or individual is responsible for ensuring that funding when necessary is identified and secured prior to the initiation of contracting activity.
- 6.3 These responsibilities apply to both revenue and expense contracts. All funding associated with contracts must be coordinated with the Treasurer, or the Finance Committee prior to initiation.
- 6.4 All requirements for each contract are the responsibility of the section, committee, program or individual initiating the contract.
- 6.5 It is incumbent on the section, committee, program or individual to understand the requirements and to ensure that all contracts include and clearly address such requirements.
- 6.6 Initiation to the Finance Committee of contract renewal, cancellation or modification is the responsibility of the section, committee, program or individual that originally initiated the contract.
- 6.7 The Finance Committee is responsible for administrative compliance, appropriateness, development, execution and maintenance of all contracts.
- 6.8 The Treasurer/Finance Committee will establish systems to track contract status.
- 6.9 The Finance Committee will assist, as needed, the section, committee, program or individual in the negotiation, development, modification and renewal of contracts

- 6.10 The Finance Committee is responsible for all exceptions to the GPHA's standard contract language and/or process.

7.0 PROCEDURES

- 7.1 A contract begins with the initial negotiation, preparation and completion of standard documents for submission to the Finance Committee. The Finance Committee originates the contract draft, coordinates review, incorporates required changes and coordinates execution by the contracting entity and GPHA.
- 7.2 The contract process may require three to six weeks.
- 7.3 It is incumbent upon the section, committee, program or individual desiring the contract to plan contract development on an annual basis, to establish priorities and to initiate the process in a timely manner.
- 7.4 Contract requests are submitted to the Treasurer/Finance Committee from the section, committee, program or individual level through the completion and submission of a Request for Contract form (attached) or by the award of a competitive solicitation.
- 7.5 The section, committee, program or individual must complete the Request for Contract form, to include the scope of service(s) to be provided, along with the contract period and the dollar amount of the contract, as well as other required information as outlined on the Request for Contract form.
- 7.6 This process is applicable to all contracts obligating GPHA, including any contract or agreement initiated by a party outside of GPHA.
- 7.7 Upon receipt, the Request for Contract form is reviewed for completeness and accuracy by the Treasurer.
- 7.8 It is possible that the request for services or products must be competitively solicited. This determination will be at the discretion of the Finance Committee and adhere to the purchasing policy(s) of GPHA.
- 7.9 If determined that the request for services or products must be competitively solicited, the Treasurer/Finance Committee will work with the requesting section, committee, program or individual. If the contract is a result of a proposal award or other accepted process, the proposed independent contractor is verified and the scope of services is reviewed for feasibility.
- 7.10 Based on the information provided in the Request for Contract form, a draft contract, if not having been provided by the section, committee, program or individual, is prepared, including all essential contractual requirements protecting the interests of GPHA.
- 7.11 All contracts initiated by a third party, or party other than GPHA, will be reviewed for content and form prior to further processing.
- 7.12 If it is determined that modifications are necessary to protect the interests of GPHA, the Treasurer will contact the initiator of the contract, as noted on the Request for Contract form.
- 7.13 A copy of the draft may also be sent to the section, committee, program or individual affected by the contract for written approval as to modifications of content and form.

- 7.14 Upon approval by all parties the copy is returned to the Treasurer of GPHA for final drafting.
- 7.15 Once the draft is finalized, the Treasurer will submit it to the GPHA Board for final approval.
- 7.16 Approval of contracts requires a majority vote of the Board. Board approval may be obtained through various methods including electronic voting in order to expedite the contracting process.
- 7.17 Once GPHA Board approval is obtained two original forms of the contract are delivered to the independent contractor for execution.
- 7.18 Each original form of the contract requires an original authorizing signature, which must correspond with the information submitted on the Request for Contract form. All contracts must be original, with no unauthorized mark outs or erasures.
- 7.19 Upon return from the contracting entity, the original contracts are reviewed by the Treasurer for proper signatory execution.
- 7.20 Upon acceptance, the contracts are sent to the President or the Executive Services Provider for the appropriate signature. The signature of the executing authority is attested by the Treasurer.
- 7.21 Upon attestation, the contract is considered valid and in force. No products shall be procured or services performed until such time as the contract is executed.
- 7.22 Upon execution, the Treasurer prepares the contract for distribution to the independent contractor, the Finance Committee, the President and/or the Executive Services Provider and the section, committee, program or individual who initiated the original contract proposal.
- 7.23 One of the original copies of the executed contract is placed in the permanent contract file of GPHA. The second original is mailed to the independent contractor by registered mail.
- 7.24 The terms of the contract as submitted by the initiating section, committee, program or individual require careful monitoring by the section, committee, program or individual to ensure compliance.
- 7.25 Contract compliance and service provision are the responsibilities of the initiating section, committee, program or individual. In the event of non-compliance, the section, committee, program or individual should immediately contact the Finance Committee to discuss the terms of the contract, reasons for non-compliance and alternatives for ensuring compliance, including suspension and, possible, termination.
- 7.26 It is incumbent on the section, committee, program or individual to maintain accurate records and documentation in alignment with the contractual obligations of all contracting parties.

8.0 REVISION HISTORY

REVISION #	REVISION DATE	REVISION COMMENTS
0	1/23/2013	Initial Issue
1	4/4/2019	New Template & Updates

9.0 RELATED FORMS

Request for Contract form



GEORGIA PUBLIC HEALTH ASSOCIATION, INC.
POLICY # FIN-01711
GIFTS AND DONATIONS POLICY AND
PROCEDURES

1.0 PURPOSE

This policy is for the purpose of:

- 1.1 Establishing guidelines for receiving gifts and donations.

2.0 AUTHORITY

The Georgia Public Health Association, Inc. (GPHA) Gifts and Donations Policy and Procedures is published under the authority of GPHA and in compliance with the following:

- 2.1 Bylaws of the Georgia Public Health Association, Inc.
- 2.2 501(c)(3) of the Internal Revenue Code
- 2.3 GPHA Executive Board

3.0 DEFINITIONS

- 3.1 GPHA – Georgia Public Health Association, Inc.
- 3.2 The Association – GPHA
- 3.3 Finance Committee – Standing committee of the Association

4.0 SCOPE

This policy applies to all Executive Board members, Section officers, Committee chairs, Independent Contractors, and members of the Georgia Public Health Association, Inc.

5.0 POLICY

- 5.1 GPHA will maintain an independent position on public health issues and concerns.
- 5.2 GPHA will solicit and accept financial and/or material contributions only for projects and activities that are consistent with the Association's mission and that abide by relevant GPHA by-laws, guidelines, and other policies governing such projects and activities.
- 5.3 GPHA will accept funds for informational and educational activities only when the content is to be determined by GPHA or an independent body of public health professionals designated by GPHA.
- 5.4 GPHA will not permit product promotions as part of a Continuing Education activity.
- 5.5 GPHA will not to provide product endorsements.
- 5.6 All donations over \$5,000 must be reviewed by the Finance Committee and approved by the GPHA Executive Board.

- 5.7 GPHA will maintain complete control of all financial and/or material contributions for all its projects and activities.
- 5.8 Recognition of financial and/or material contributions by a contributing source will be limited to publication of contributor name, logos or slogans that are an "established part of the contributor's identity," and trade names only.
- 5.9 No GPHA project should directly generate sales of products of a contributing source/donor. If appropriate, information will be provided to the participants and public that there is no commercial obligation implied by the support of a contributing source.
- 5.10 GPHA's intangible intellectual assets, including the Association's name and logo, must be protected. Donors will not be permitted to use GPHA's name or logo for any commercial purpose or in connection with the promotion of any product.

6.0 RESPONSIBILITIES

- 6.1 The Executive Board shall ensure compliance to this policy.
- 6.2 The Finance Committee is responsible for reviewing and updating this policy.
- 6.3 All officers and members of the Association are responsible to adhere to this policy.

7.0 PROCEDURES

- 7.1 GPHA acknowledges that some contributing sources may generate controversy among and/or objections from the section's membership. In such cases, any member of GPHA can bring the situation to the attention of the Association leadership via written notification (email or hardcopy).
- 7.2 Any situation that may be an exception to this Policy will be reviewed by the Executive Committee of the Board. The Executive Board will determine the final course of action

8.0 REVISION HISTORY

REVISION #	REVISION DATE	REVISION COMMENTS
0	4/4/2019	Initial Issue

9.0 RELATED FORMS & DOCUMENTS

None



**GEORGIA PUBLIC HEALTH ASSOCIATION, INC.
POLICY # IT-05701
INFORMATION TECHNOLOGY POLICY**

1.0 PURPOSE

This policy is to provide guidelines on the GPHA website/linkages and to protect the online personal identifiable information of the GPHA members and visitors.

2.0 AUTHORITY

The Georgia Public Health Association, Inc. (GPHA) Information Technology Policy and Procedures is published under the authority of GPHA and in compliance with the following:

- 2.1 Bylaws of the Georgia Public Health Association, Inc.
- 2.2 501(c)(3) of the Internal Revenue Code
- 2.3 GPHA Executive Board

3.0 DEFINITIONS

- 3.1 GPHA – Georgia Public Health Association, Inc.
- 3.2 The Association – GPHA

4.0 SCOPE

This policy applies to all Executive Board members, Section officers, Committee chairs, Independent Contractors, and members of the Georgia Public Health Association, Inc.

5.0 POLICY

- 5.1 The Georgia Public Health Association (GPHA) maintains a website under the domain www.gapha.org.
- 5.2 The goal of the website is to provide quality web resources consistent with the mission of the organization.
- 5.3 GPHA reserves the right to ask for a reciprocal link to be placed on any website to which GPHA links.
- 5.4 GPHA reserves the right to change, alter, amend or suspend the linking terms and conditions at any time without prior notice to third parties.
- 5.5 GPHA may provide links to internet sites maintained by third parties, over which GPHA has no control.

- 5.6 GPHA does not endorse the content, operators, products or services of such sites, and GPHA is not responsible or liable for the content, operators, availability, accuracy, quality, advertising, products, services or other materials on or available from such sites.
- 5.7 GPHA shall not be responsible or liable, directly or indirectly, for any damage or loss caused or alleged to be caused by or in connection with use of or reliance on any such content, products or services available on or through such sites.
- 5.8 The link shall be so configured that GPHA's Uniform Resource Locator (URL), www.gpha.org is displayed continuously in a user's browser once the link is completed.
- 5.9 Any text-only link must be clearly marked "Georgia Public Health Association."
- 5.10 The website and its appearance and contents shall not be altered, modified, distorted or obscured in any way, through framing or otherwise.
- 5.11 The names, marks, terms, graphics or other materials on GPHA's website shall not be used in a manner that is likely to cause confusion with, or dilute the effectiveness of, GPHA's trademarks and service marks, or to damage the reputation or commercial image of GPHA or any of its products or services.
- 5.12 Any authority granted to a third party to link its website to GPHA's website does not authorize the use of any of GPHA's trademarks. The GPHA logos, trademarks and service marks appearing on its website shall not be used without GPHA's prior written consent.
- 5.13 Third parties shall not copy, distribute, or otherwise lift any of the contents of any of the GPHA's website, nor are they authorized to incorporate content of the GPHA website into other websites or media without express written permission from GPHA, or to use GPHA content for commercial or fundraising purposes.
- 5.14 GPHA has the right to remove a link to our site if it can be perceived to be confusing, deceptive, or damaging in any way.
- 5.15 GPHA asserts the right to reject or later to withdraw third parties' legal permission to link to the GPHA website at any time.
- 5.16 GPHA reserves the right to exercise and exhaust any right, privilege or remedy available to it under this Policy, including, without limitation, instituting legal action and/or taking measures to deny access to any of GPHA's website from the website of the third party.
- 5.17 GPHA collects and stores only information provided by members and visitors.
- 5.18 GPHA does not collect any information from visitors browsing its website. Visitors to the GPHA website browse anonymously. Only aggregate data is collected and only used for internal analysis and marketing purposes.
- 5.19 GPHA collects limited identifying information, which may include name, organization name, phone number, street address and e-mail.
- 5.20 GPHA may release the names and addresses of its members to external entities, agencies, or organizations upon approval by the Executive Committee. In certain instances, the Executive Committee may determine that it is in the best interest of GPHA to provide a mailing to the membership on behalf of an outside entity. This will be done to provide our constituents with information that is compatible with the GPHA mission.

GPHA never rents or sells e-mail addresses. This privacy statement will be updated to reflect any policy revisions.

- 5.21 When GPHA accepts credit card account information, it is submitted directly to the appropriate financial institution. GPHA does not disclose or maintain credit card account information.
- 5.22 GPHA uses cookies only to enable access to members-only data without re-logging in each time, for data logging and site traffic analysis.
- 5.23 GPHA may use visitor information for new, unanticipated uses not previously disclosed in our privacy notice. If our information practices change, GPHA will post the policy changes on the website to notify and provide the ability to opt out.
- 5.24 Upon request, GPHA will provide site visitors access to their information. The information may be accessed or corrected by sending an e-mail to director@gapha.org.

6.0 RESPONSIBILITIES

- 6.1 The Executive Board shall ensure compliance to this policy.
- 6.2 The Executive Board is responsible for reviewing and updating this policy.

7.0 REVISION HISTORY

REVISION #	REVISION DATE	REVISION COMMENTS
0	1/23/2013	Initial Issue
1	4/4/2019	New Template & Updates

8.0 RELATED FORMS

None



**GEORGIA PUBLIC HEALTH ASSOCIATION, INC.
POLICY # COM-03601
USE OF SOCIAL MEDIA POLICY AND PROCEDURES**

1.0 PURPOSE

The purpose of this policy is:

- 1.1 To support, encourage and maintain (best practices as Sections implement and manage their social media properties.
- 1.2 To support and strengthen the GPHA Section network alliance through social media enhancement.
- 1.3 To foster GPHA and Section visibility, membership engagement, and membership promotion.
- 1.4 To enhance communication efforts among GPHA, its Sections and Membership.

2.0 AUTHORITY

The Georgia Public Health Association, Inc. (GPHA) Use of Social Media Policy and Procedures is published under the authority of GPHA and in compliance with the following:

- 2.1 Bylaws of the Georgia Public Health Association, Inc.
- 2.2 501(c)(3) of the Internal Revenue Code
- 2.3 GPHA Executive Board

3.0 DEFINITIONS

- 3.1 GPHA – Georgia Public Health Association, Inc.
- 3.2 The Association – GPHA
- 3.3 Social Media - websites and applications that enable users to create and share content or to participate in social networking.

4.0 SCOPE

This policy applies to all Executive Board members, GPHA Sections, members, and non-members, using social media as a Section strategic communication tool. It does not address personal member or student participation in social media.

5.0 POLICY

- 5.1 Section specific use of social media platforms is limited to the internet based networking applications LinkedIn, Facebook, or others as approved by the GPHA Executive Board.

- 5.2 Ethical and professional standards should be applied to all online interactions through social media and social network sites.
- 5.3 GPHA will provide a Section-specific social media email, and formatted tabs on the www.gapha.org website.
- 5.4 All Sections will provide an identifying Section-specific descriptive paragraph for use as a Section identifier on both www.gapha.org and Section developed social media applications.
- 5.5 Personal use of social media by members/students in conjunction with GPHA Section business is prohibited.
- 5.6 Any branding and website linkage that ties the Section to GPHA will adhere to the GPHA Information Technology Policy.
- 5.7 Proper respect for intellectual property laws must be observed.
- 5.8 Section management will emphasize the importance of GPHA and Section social media policies and will train participating staff and volunteers accordingly.
- 5.9 GPHA reserves the right to monitor, counsel, or restrict Section access to any social media site, if for any reason a Section is non-compliant with this policy or generated content is deemed inappropriate (e.g. political lobbying, solicitations, or taking a position on any legislation or law).
- 5.10 Any modifications to this policy will be electronically communicated to the current Section Chair and Vice Chair.

6.0 RESPONSIBILITIES

- 6.1 The Executive Board shall ensure compliance to this policy.
- 6.2 All Executive Board members, Section officers, Committee chairs, Independent Contractors and members of the Association are responsible to adhere to this policy.

7.0 PROCEDURES

- 7.1 Assistance in setting up social media accounts and settings can be obtained from GPHA web service provider.
- 7.2 Each Section will notify the President and Executive Services Provider, in writing, of its intent to start-up a Section specific social media project, and designate the following details:
 - 7.2.1 Identify the specific networking application(s) to be used.
 - 7.2.2 Identify the individual(s) who will act in official capacity to create, develop, manage, and post content.
 - 7.2.3 Identify at least (2) administrators to each social media account. If only one administrator can be assigned to the account, more than one person will hold the username and password.

- 7.2.4 Changes in designated individuals must be submitted in writing.
- 7.3 The GPHA web service provider will provide oversight for website updates and social media set up and usage, as part of contracted duties. For Sections, this involves:
- 1) set up an email (SECTIONNAME@gapha.org) for each Section
 - 2) support initial social media setup
 - 3) monitor Section support time usage
- 7.3.1 Cost accounting will be maintained for:
- 7.3.1.1. GPHA website and social media
 - 7.3.1.2. Section social media implementation and support
 - 7.3.1.3. Section TAB content set up and updates on GPHA website
- 7.3.2 Section cost accounting will be based on actual support time usage. GPHA web service provider will maintain a time account balance for each Section and submit a summary in ongoing monthly reports to Executive Services Provider. This service will be provided as part of the current contract, and paid for using the bank of pre-purchased service hours in place for the current contract year.
- 7.4 Section leadership is responsible for monitoring its' section email SECTIONNAME@gapha.org.
- 7.5 Section leadership will initially consult/troubleshoot with director@gapha.org if assistance is needed.
- 7.6 Administrative Settings
- Delegation of an individual who can thoroughly review all the administrative options is advised. Administrative settings can be crucial to how social media space functions.
- 7.7 Governance
- 7.7.1 Name multiple administrators to each social media account. If only one administrator is assigned to the account, make sure more than one person holds the username and password.
 - 7.7.2 Keep your accounts secure by using strong passwords.
- 7.8 Copyright and Trademark Infringements
- 7.8.1 Social media is another form of publishing so the same intellectual property laws apply. Avoid posting copyrighted material, cite the author when quoting or provide a link to the original content; and avoid other defamation and invasion of privacy issues.

8.0 REVISION HISTORY

REVISION #	REVISION DATE	REVISION COMMENTS
0	11/28/2016	Initial Issue
1	4/4/2019	New Template & Updates

9.0 REFERENCES

- CDC-GA-2011-01. CDC.gov Social Media Policy Last Updated January 8, 2015
- Social Media Guidelines for PMI Chapters: August 2013
- CDC The Health Communicator's Social Media Toolkit July 2011



**GEORGIA PUBLIC HEALTH ASSOCIATION, INC.
POLICY # MEM-02601
MEMBERSHIP RENEWAL POLICY AND
PROCEDURES**

1.0 PURPOSE

This purpose of this policy to establish guidelines for the renewal membership of the Georgia Public Health Association.

2.0 AUTHORITY

The Georgia Public Health Association, Inc. (GPHA) Membership Renewal Policy and Procedures is published under the authority of GPHA and in compliance with the following:

- 2.1 Bylaws of the Georgia Public Health Association, Inc.
- 2.2 501(c)(3) of the Internal Revenue Code
- 2.3 GPHA Executive Board

3.0 DEFINITIONS

- 3.1 GPHA – Georgia Public Health Association, Inc.
- 3.2 The Association – GPHA

4.0 SCOPE

This policy applies to all Executive Board members, Section officers, Committee chairs, Independent Contractors, and members of the Georgia Public Health Association, Inc.

5.0 POLICY

- 5.1 All membership renewals are due and payable one year from the date last paid, except for the Board of Health membership.
- 5.2 All Board of Health memberships run concurrent with the State fiscal year, July 1 to June 30.
- 5.3 The Association utilizes an online membership database system, to manage all member data including invoices and online payments.
- 5.4 The online database emails the member 30 days prior to expiration of time to renew and again on the renewal due date.
- 5.5 The online database emails the member 30 days past due that the membership is expired.
- 5.6 Renewals made outside the 60-day grace period shall be counted as a new membership with a new anniversary date.

5.7 Active membership for the purpose of qualifying to hold office in GPHA is defined as three consecutive years with no break in membership.

6.0 RESPONSIBILITIES

6.1 The Executive Board shall ensure compliance to this policy.

7.0 PROCEDURES

7.1 Every thirty days an inactive membership report shall be given to the Section Chairs or designees to follow up on membership renewal for members in their respective sections.

8.0 REVISION HISTORY

REVISION #	REVISION DATE	REVISION COMMENTS
0	1/23/2013	Initial Issue
1	4/4/2019	New Template and Formatting

9.0 RELATED FORMS

None