APPLICANT RESPONSE PLAN

Record progress on T:\Membership Forms\Membership-Recruit\Application Checkoff.xls

IF STARTING PROCESS WITH A TELEPHONE OR E-MAILED REQUEST FOR AN APPLICATION:

? **INFORM** (if they seem unsure)

- ? "The Inland Empire Planning Council is a volunteer planning group that determines how to use millions of dollars in grant money that the Riverside/San Bernardino area receives to provide medical care and support services to persons living with HIV/AIDS. As a member of this group, you would be involved in the process of determining which services are most important to people living with HIV/AIDS in the San Bernardino/Riverside area and you would be involved in deciding how much of the grant money goes to each service. The amount of time you volunteer could range from many hours each week to only a few hours each month. It's up to you."

? **PROVIDE WEB INFORMATION**

- ? "You can access the application and other information on the Planning Council's website at: www.sbcounty.gov/hivplanningcouncil/app.htm"
- ? "Would you like a hard copy of the application and additional information about the Planning Council mailed to you?"
  - o If **NO**, "OK. Thank you for your interest. Please call again if you have any questions."
  - o If **YES**, continue…

? **GATHER INFORMATION**

Name	
Phone Number	
Residential Address	
E-mail Address	
Name of Organization (if applicable)	
Organization Phone # (if applicable)	
Organization Address (if applicable)	

- ? "An application will be sent to you and the chair of the Membership Committee will be contacting you to see if you have any additional questions. Thank you for your interest and please feel free to call again if you have any questions." **END OF CALL**

? **INFORM MEMBERSHIP CHAIR**

- ? Inform the chair of the Membership Committee that you are sending out an application. Provide the chair with the potential applicant's information and indicate that you informed the potential applicant that the chair would be contacting them.

? **MAIL APPLICATION PACKET**

- ? Application
- ? Information about the Planning Council (including contact info)
- ? Calendar

? **FOLLOW-UP**

- ? Membership Chair contact potential applicant 10 working days after sending out packet
- ? Verify that he/she received the packet
- ? Find out if he/she has any questions
- ? Determine if and when he/she plans on submitting an application

IF STARTING THE PROCESS FROM THE MOMENT AN APPLICATION IS RECEIVED:

? **WHEN APPLICATION IS RECEIVED**

- ? Make 10 copies to take to next Membership Committee Meeting
- ? Send a copy of the application to the Membership Committee chair so that the chair can contact the applicant
- ? Keep the original application in a closed and secure location with the other original applications.
- ? Only the Membership Chair and PC Co-Chairs should have access to the applications.

? **INFORM APPLICANT OF RECEIPT OF APPLICATION (Packet)**

- ? Staff send letter of receipt within 15 calendar days of receipt of Application (Make sure Membership Chair has already contacted)
- ? Send Planning Council Responsibilities Description
- ? Send Description of Membership Categories
- ? Send Monthly Meeting Schedule
- ? Send Membership Mini Binder
- ? Include Conflict of Interest Statement (Article VII of the Bylaws). Inform applicant that 700 Form will be required if appointed.
- ? Send PC Agenda packet (Get Membership Chair OK for invite)

? **QUALIFICATION**

- ? Membership Chair presents app. at next Membership meeting…copies to be returned after meeting.
- ? Membership Committee determines if applicant qualifies (if they fit into a category that has a vacancy: county, affiliation, race, etc.)
- ? If qualifies, staff send Letter of Qualification to applicant including:
  - o Description of Membership Categories
  - o Meeting Schedule
  - o Attendance Requirements (process toward auto-resignation)
  - o Notify of first official meeting they should attend and that attendance requirements will begin with that meeting.
  - o Notify that the training period will be for 6 months, during which the applicant/new member is required to attend membership training meetings prior to each PC meeting.
- ? Staff send copy of Letter of Qualification to the Membership Chair
- ? Place applicant in database as “Attendee” of Planning Council at instruction of the membership committee.
- ? If DOES NOT qualify, PC Chair authors a letter and staff sends the letter encouraging continued participation in committee(s)…just not as a voting member.

? **MENTOR**

- ? Membership Committee chair assigns a mentor and informs staff
- ? Staff sends appointment letter to mentor with duties:
  - o Minimum 6 month commitment
  - o Help applicant select appropriate committee(s)
  - o Inform applicant about mandated categories for membership and how the process works
  - o Make reminder calls for appropriate committee meetings
  - o If necessary, assign new mentor for the duration of the 6 months (an individual who is a member of the applicant's primary committee
  - o Final mentor: Maintain constant communication (phone calls), sit with applicant at meetings, answer any questions

? **FIRST OFFICIAL MEETING (Membership Committee)**

- ? Meet mentor
- ? Determine which committee(s) applicant will join
- ? Staff adds to appropriate mailing lists as "Attendee".
- ? Assign new mentor if necessary (one that is a member of the selected, primary committee)
- ? Attendance requirements begin with this meeting.

? **PLANNING COUNCIL APPROVAL**

- ? After applicant attends 2 PC meetings and at least 2 committee meetings (which could be the County Committee meetings).
- ? Membership Chair recommends approval of applicant
- ? Applicant tells the PC a little bit about him/herself
- ? Applicant leaves the meeting room
- ? PC Members discuss the recommendation and vote (majority vote)
- ? If approved, move action to the Board of Supervisors

? **BOARD OF SUPERVISORS**

- ? Submit applicant's name to Grantee Staff Analyst for Board of Supervisor approval
- ? BOS approval received: _____ (date)
- ? Make copies of BOS approval for future use
- ? Keep the original in a closed and secure location with the other originals.

? **AFTER BOARD APPROVAL**

- ? Identify applicant in database as "Member" of Planning Council and relevant committees.
- ? Send Letter of Appointment to new member.
- ? Send 700 Form and Statement of Commitment Form to be filled out and returned immediately.
- ? Provide new member with Planning Council Workbook at the next meeting